CRM User Manual

IT Div. D.J. Chan

Oct,1 2012

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Etron Technology, Inc.

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Outline

- CRM Expert System Introduction ..... Page 3 – 3
- How to Login CRM ..... Page 4 – 7
- Sales Portal & Detail Function ..... Page 8 – 39
  - Home ..... Page 8 – 31
  - Upload ..... Page 32 – 36
  - Customer ..... Page 37 – 39
- Sales Operation Dept. Portal ..... Page 40 – 41
- Sales Head Portal ..... Page 42 – 44
- Expert's Portal ..... Page 45 – 46
- Asignee's Portal ..... Page 47 – 49
- President's Portal ..... Page 50 – 53

Expert System - Request help & reply Data Flow

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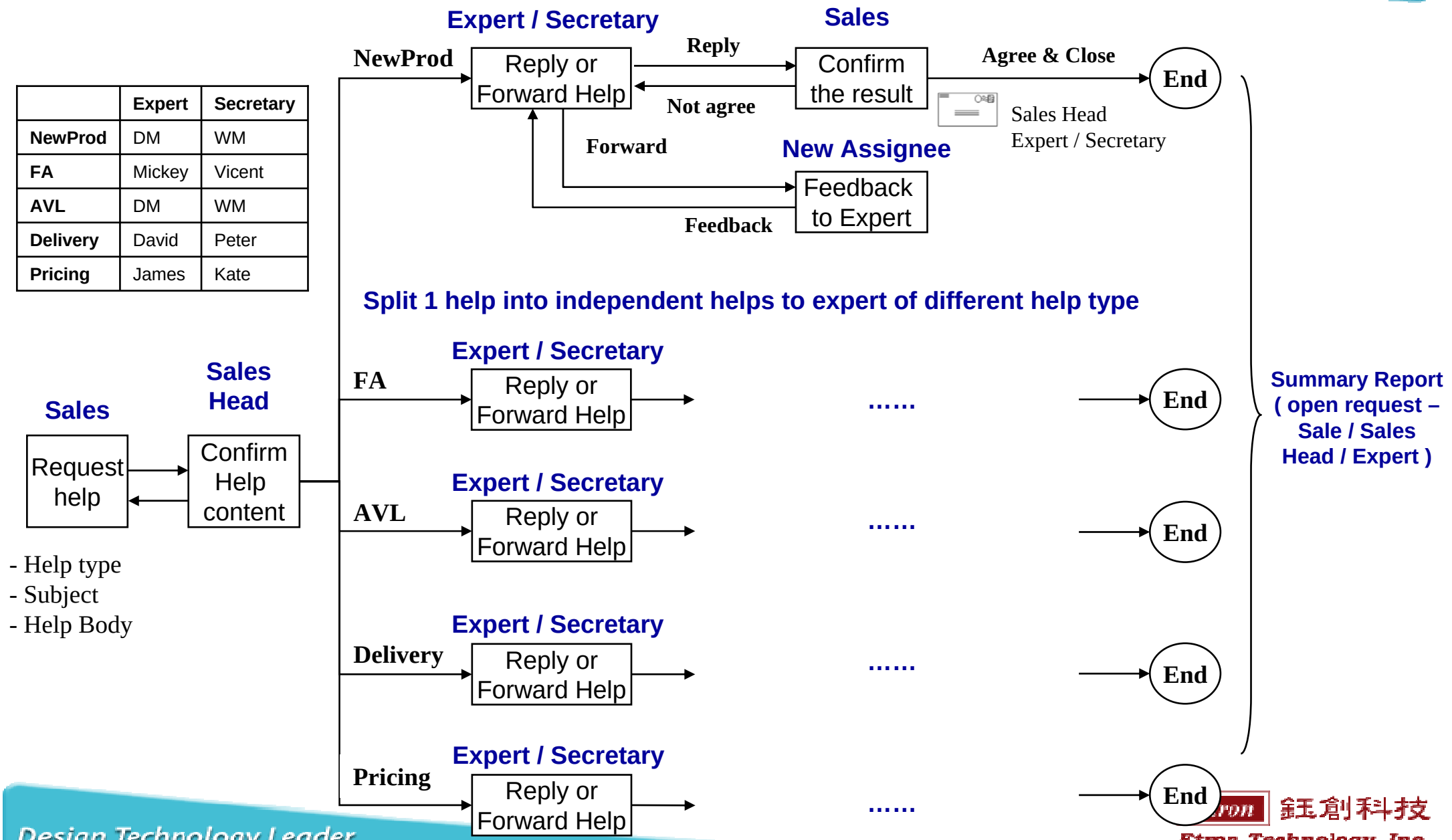
	Expert	Secretary
NewProd	DM	WM
FA	Mickey	Vicent
AVL	DM	WM
Delivery	David	Peter
Pricing	James	Kate



How to Login CRM - External

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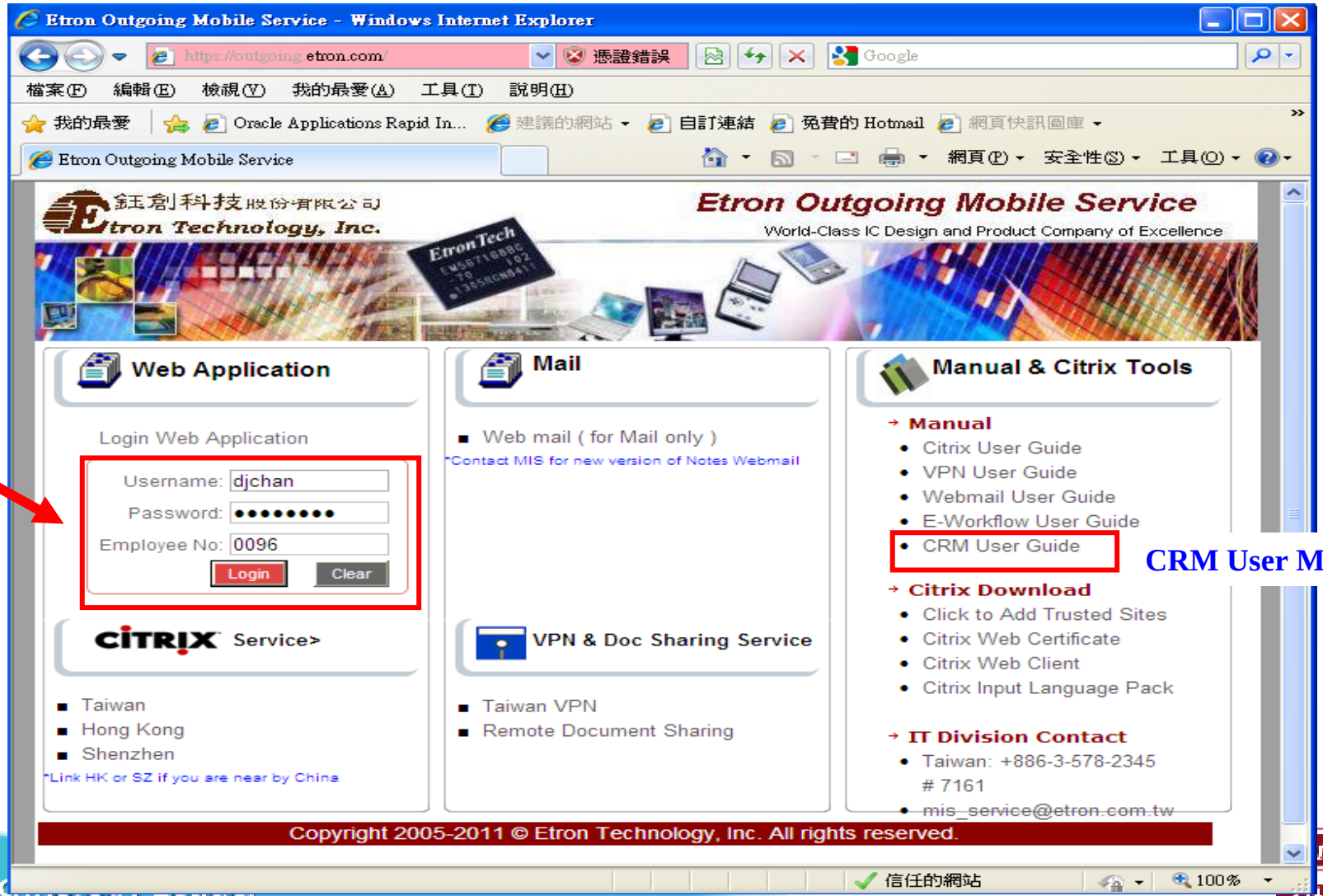
- Open IE，Enter https://outgoing.etron.com/ → Access to Etron Outgoing Mobile Service
- Enter Username/ Password/ Employee No → Login → Access to Web Application



CRM User Manual

How to Login CRM- External

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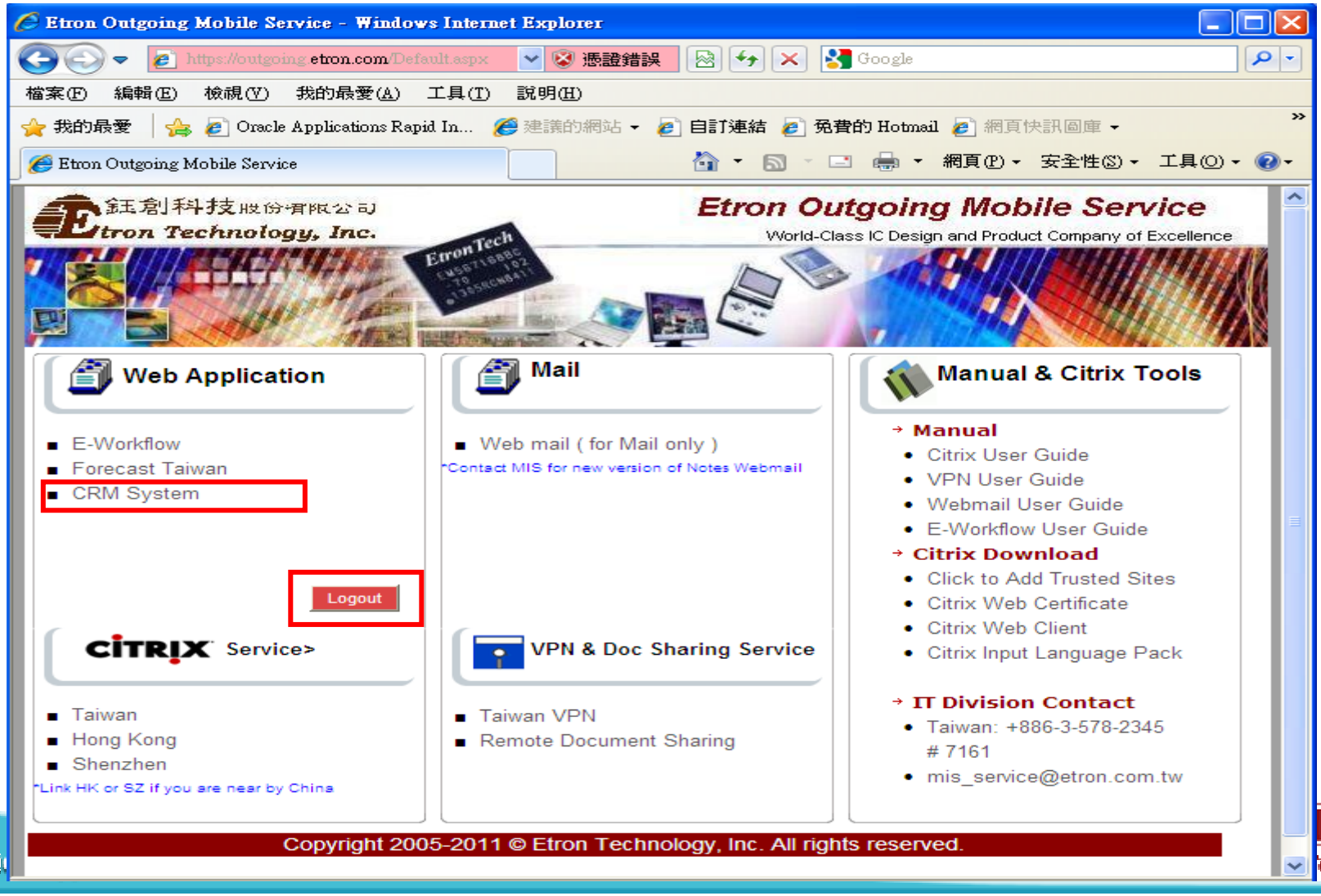
- Click CRM System, then access to CRM
- Click Logout, then exit Web Application



How to Login CRM- External

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- Enter Username/ Password→ Login → Access to CRM

https://outgoing.etron.com/ - Logon to CRM System - Windows Internet Explorer
Etron 鈺創科技
Etron Technology, Inc.
World-Class IC Design and Product Company of Excellence
Welcome to CRM System
Username: djchan
Password:
Login
Clear
* Please Enter Your Windows Username and Password

How to Login CRM- Internal

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- Double Click Big M System Icon
- Click CRM Button to Access CRM (Do not need to enter User name / Password)

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Sales Portal - Home

Sales Portal

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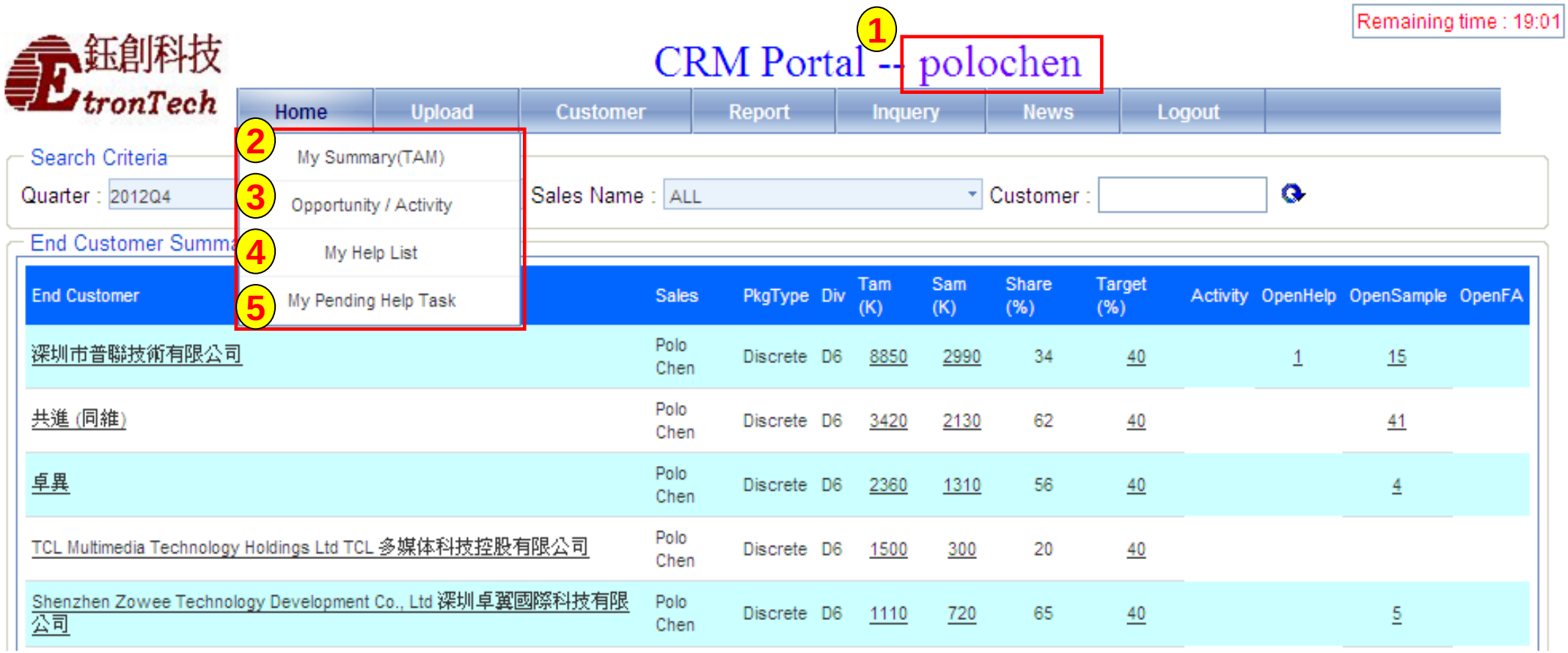
Remaining time : 19:01
鈺創科技 EtronTech
CRM Portal -- polochen
1
Home
Upload
Customer
Report
Inquery
News
Logout
2 My Summary(TAM)
3 Opportunity / Activity
4 My Help List
5 My Pending Help Task
Search Criteria
Quarter : 2012Q4
Sales Name : ALL
Customer :
End Customer Summa
End Customer | Sales | PkgType | Div | Tam (K) | Sam (K) | Share (%) | Target (%) | Activity | OpenHelp | OpenSample | OpenFA
深圳市普聯技術有限公司 | Polo Chen | Discrete | D6 | 8850 | 2990 | 34 | 40 | | 1 | 15 |
共進 (同維) | Polo Chen | Discrete | D6 | 3420 | 2130 | 62 | 40 | | | 41 |
卓異 | Polo Chen | Discrete | D6 | 2360 | 1310 | 56 | 40 | | | 4 |
TCL Multimedia Technology Holdings Ltd TCL 多媒体科技控股有限公司 | Polo Chen | Discrete | D6 | 1500 | 300 | 20 | 40 | | | |
Shenzhen Zowee Technology Development Co., Ltd 深圳卓翼國際科技有限公司 | Polo Chen | Discrete | D6 | 1110 | 720 | 65 | 40 | | | 5 |

1. Sales Name : Sales can read his/her customer data only
2. Summary Report : Default page, include TAM/SAM…data
3. Maintain opportunity, activity
4. Help list and status of Login Sales (Include Open / Closed Help)
5. Helps on the stage of login user

Sales Portal - My Summary (TAM)

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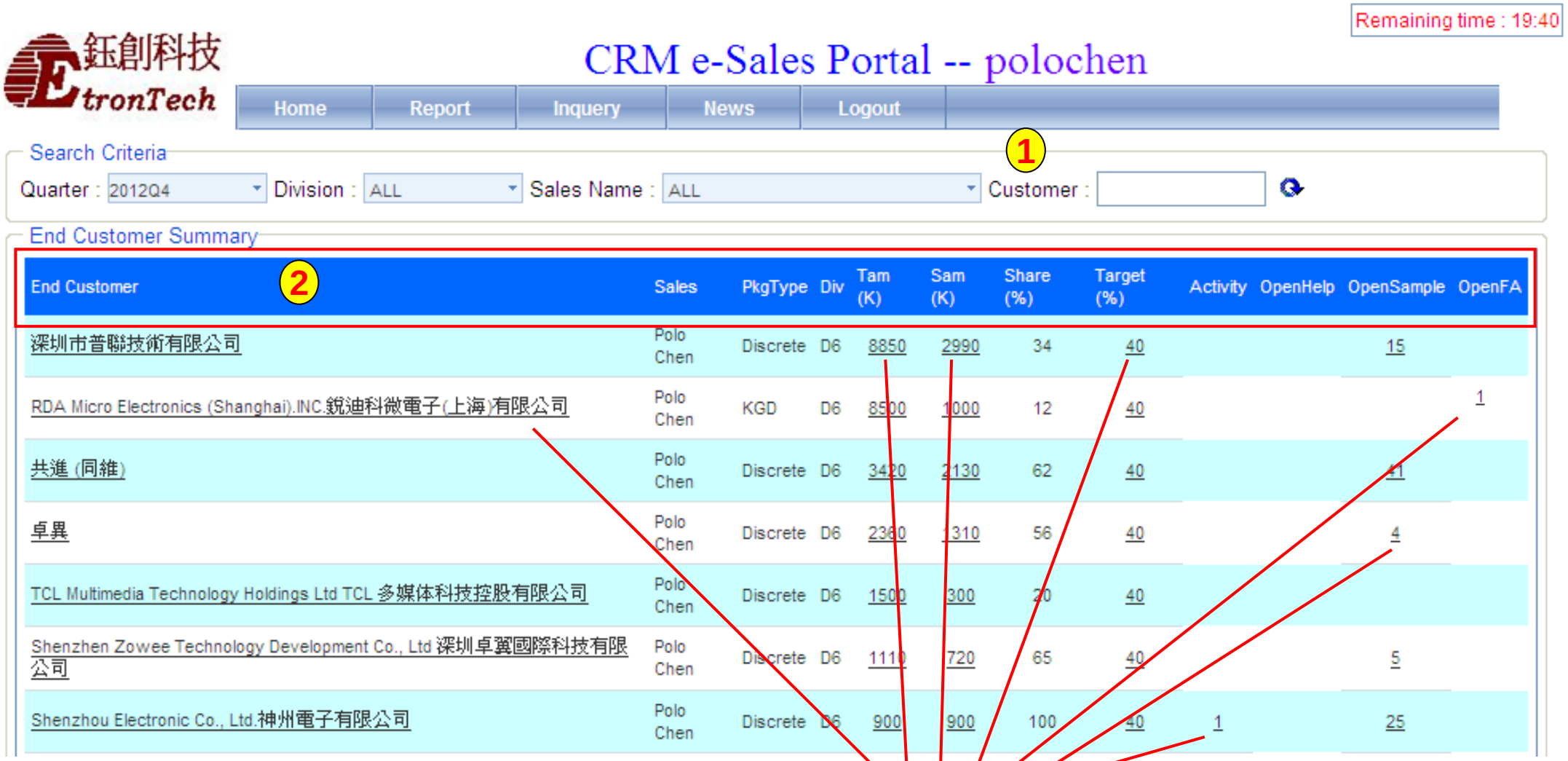

1 Search by customer only

2 Click any fields to switch descending order or ascending order.

3 Click the field with underline to drill down to detail data

Sales Portal - My Summary (TAM)

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- **Drill down to all of this Customer's Opportunities**

Remaining time : 19:40

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CRM e-Sales Portal -- polochen

Home | Report | Inquery | News | Logout

Search Criteria

Quarter : 2012Q4 Division : ALL Sales Name : ALL Customer :

End Customer Summary

End Customer	Sales	PkgType	Div	Tam (K)	Sam (K)	Share (%)	Target (%)	Activity	OpenHelp	OpenSample	OpenFA
深圳市普聯技術有限公司	Polo Chen	Discrete	D6	8850	2990	34	40			15	
RDA Micro Electro											
共進 (昆維)											

Summary Opp. -- 網頁對話

Opportunity

Quarter	End Customer	Sales	Prod	Application	PkgType	BizType	Div	BU	Tam (K)	Sam (K)	Share (%)	Target (%)	OpenHelp
2012Q4	深圳市普聯技術有限公司	Polo Chen	1M*16 SDR	Cable Router	Discrete	Commercial	D6	Memory	4500	2000	44	40	
2012Q4	深圳市普聯技術有限公司	Polo Chen	8M*16 DDR	Wireless Router/Gateway	Discrete	Commercial	D6	Memory	2400	150	6	40	
2012Q4	深圳市普聯技術有限公司	Polo Chen	4M*16 SDR	ADSL Router	Discrete	Commercial	D6	Memory	900	450	50	40	
2012Q4	深圳市普聯技術有限公司	Polo Chen	4M*16 DDR	Wireless Router/Gateway	Discrete	Commercial	D6	Memory	600	90	15	40	
2012Q4	深圳市普聯技術有限公司	Polo Chen	8M*16 SDR	ADSL Router	Discrete	Commercial	D6	Memory	300	210	70	40	
2012Q4	深圳市普聯技術有限公司	Polo Chen	16M*16 SDR	Router	Discrete	Commercial	D6	Memory	150	90	60	40	
2012Q4	深圳市普聯技術有限公司	Polo Chen	1M*16 SDR	ADSL Router	Discrete	Commercial	D6	Memory					
2012Q4	深圳市普聯技術有限公司	Polo Chen	1M*16 SDR	DVD Player	Discrete	Commercial	D6	Memory					
2012Q4	深圳市普聯技術有限公司	Polo Chen	32M*16 DDR	STB	Discrete	Commercial	D6	Memory					
2012Q4	深圳市普聯技術有限公司	Polo Chen	4M*16 DDR	LCD TV	Discrete	Commercial	D6	Memory					

Change page: 1 2

Displaying page 1 of 2, items 1 to 10 of 11.

Design Tech

Sales Portal - My Summary (TAM)

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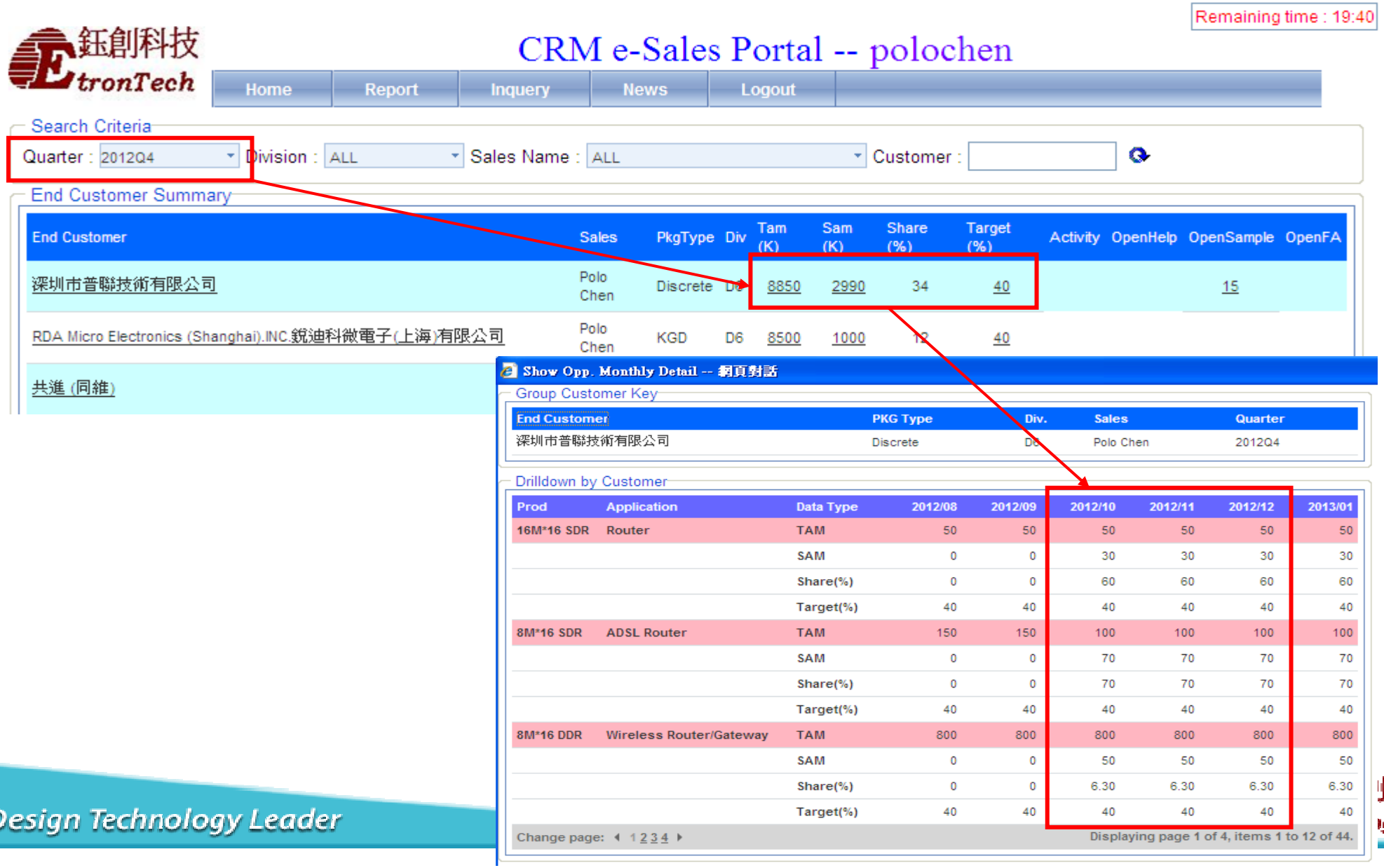
- Drill down to Customer's TAM/SAM/Share/Target detail



Sales Portal - My Summary (TAM)

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- **Drill down Customer's Activity**

Remaining time : 19:57

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CRM e-Sales Portal -- polochen

Home | Report | Inquery | News | Logout

Search Criteria

Quarter : 2012Q4 Division : ALL Sales Name : ALL Customer :

End Customer Summary

End Customer	Sales	PkgType	Div	Tam (K)	Sam (K)	Share (%)	Target (%)	Activity	OpenHelp	OpenSample	OpenFA
Shenzhou Electronic Co., Ltd.神州電子有限公司	Polo Chen	Discrete	D6	900	900	100	40	1		25	
Alllike electronics co.,Ltd.奧萊克電子有限公司	Polo Chen	Discrete	D6	30	60	200	40	1		3	
深圳市普聯技術有限公司	Polo Chen	Discrete	D6	8850	2990	34	40			15	

Activity's attachment

Summmary Act. -- 網頁對話

Activity

End Customer	Sales	Prod	Application	Pkg Type	Activity Type	Activity Date	Contact	High Light	Low Light	Attachment
Shenzhou Electronic Co., Ltd.神州電子有限公司	Polo Chen	16M*16 DDR	STB	Discrete	Visit Customer	2012/9/20	駱敏慧	test asdf as fs f asdf s	test as fas fas df asf	FY_業務發展管理系統.ppt, CRM eSales Schedule.xls, 11g SQL Tuning.pdf

Sales Portal - My Summary (TAM)

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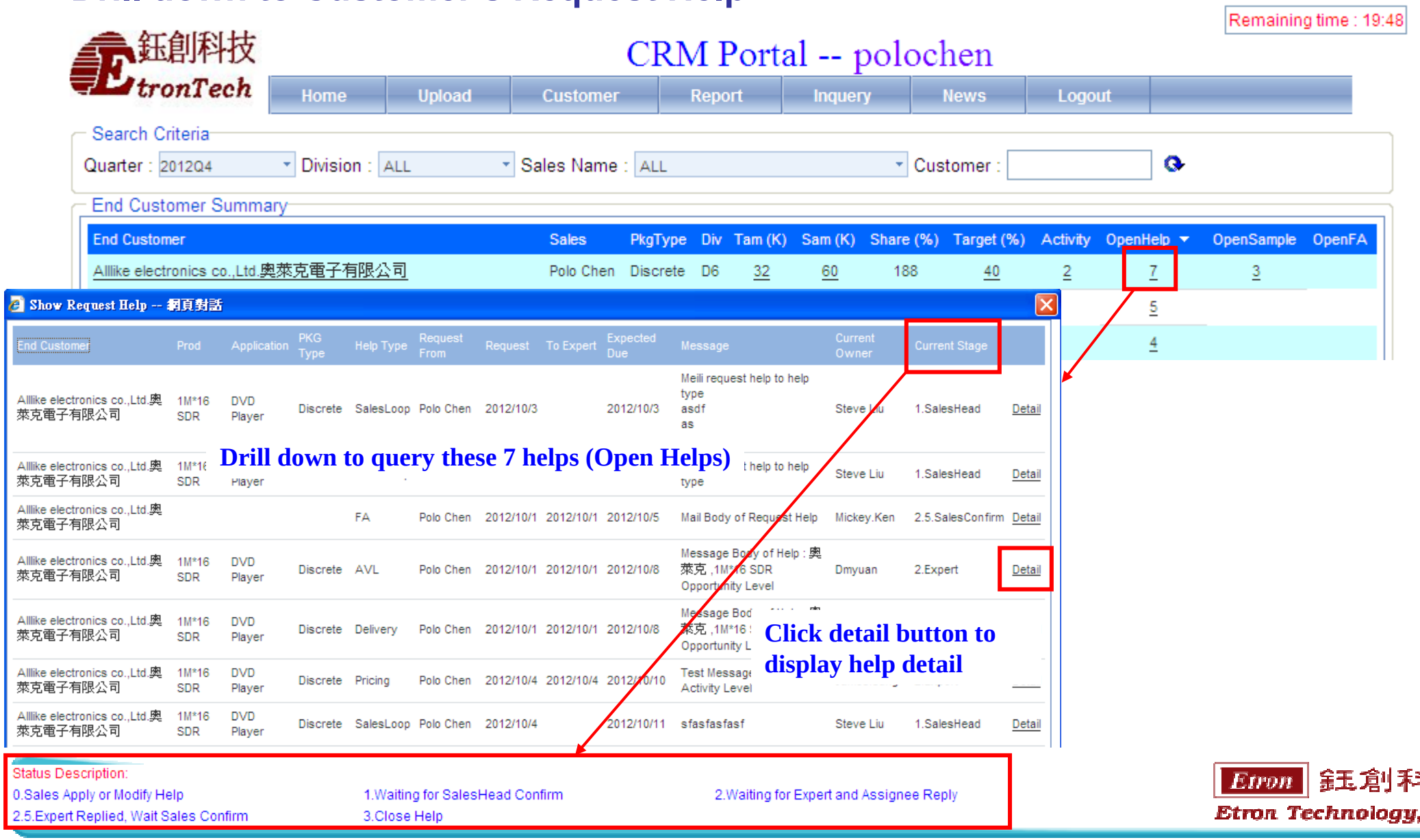
- **Drill down to Customer's Request Help**


Remaining time : 19:48
CRM Portal -- polochen
Home
Upload
Customer
Report
Inquery
News
Logout
Search Criteria
Quarter : 2012Q4
Division : ALL
Sales Name : ALL
Customer :
End Customer Summary
End Customer | Sales | PkgType | Div | Tam (K) | Sam (K) | Share (%) | Target (%) | Activity | OpenHelp | OpenSample | OpenFA
Alllike electronics co.,Ltd.奧萊克電子有限公司 | Polo Chen | Discrete | D6 | 32 | 60 | 188 | 40 | 2 | 7 | 3
5
4
Show Request Help -- 網頁對話
End Customer | Prod | Application | PKG Type | Help Type | Request From | Request | To Expert | Expected Due | Message | Current Owner | Current Stage
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | DVD Player | Discrete | SalesLoop | Polo Chen | 2012/10/3 | | 2012/10/3 | Meili request help to help type asdf as | Steve Liu | 1.SalesHead | Detail
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | Player | | | | | | | t help to help type | Steve Liu | 1.SalesHead | Detail
Alllike electronics co.,Ltd.奧萊克電子有限公司 | | | | FA | Polo Chen | 2012/10/1 | 2012/10/1 | 2012/10/5 | Mail Body of Request Help | Mickey.Ken | 2.5.SalesConfirm | Detail
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | DVD Player | Discrete | AVL | Polo Chen | 2012/10/1 | 2012/10/1 | 2012/10/8 | Message Body of Help : 奧萊克 ,1M*16 SDR Opportunity Level | Dmyuan | 2.Expert | Detail
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | DVD Player | Discrete | Delivery | Polo Chen | 2012/10/1 | 2012/10/1 | 2012/10/8 | Message Bod 萊克 ,1M*16 Opportunity L
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | DVD Player | Discrete | Pricing | Polo Chen | 2012/10/4 | 2012/10/4 | 2012/10/10 | Test Message Activity Level
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | DVD Player | Discrete | SalesLoop | Polo Chen | 2012/10/4 | | 2012/10/11 | sfasfasfasf | Steve Liu | 1.SalesHead | Detail
Drill down to query these 7 helps (Open Helps)
Click detail button to display help detail
Status Description:
0.Sales Apply or Modify Help
1.Waiting for SalesHead Confirm
2.Waiting for Expert and Assignee Reply
2.5.Expert Replied, Wait Sales Confirm
3.Close Help

Sales Portal - My Summary (TAM)

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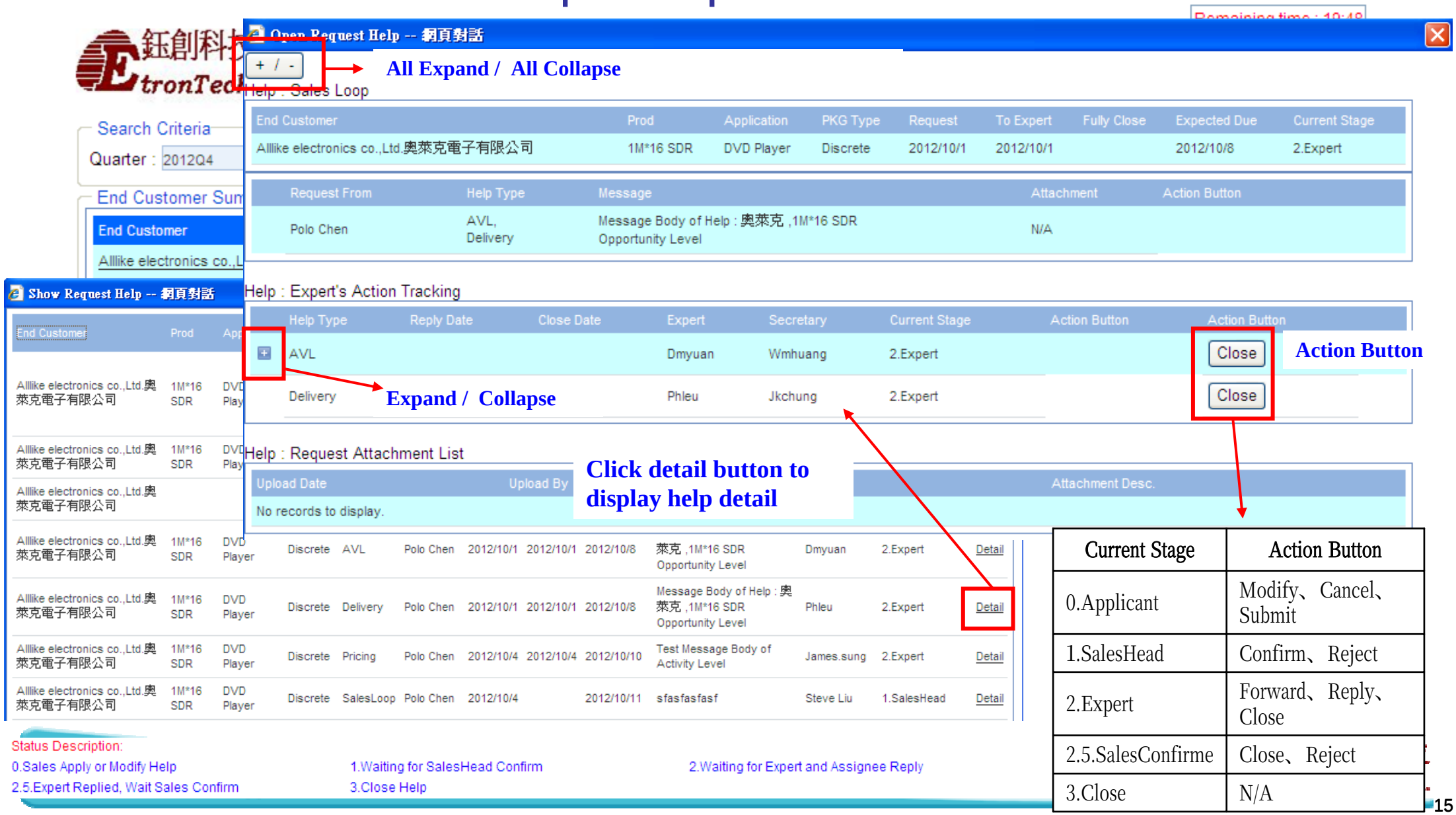
- **Drill down to Customer's Request Help**


Open Request Help -- 網頁對話
+ / -
All Expand / All Collapse
Help : Sales Loop
End Customer | Prod | Application | PKG Type | Request | To Expert | Fully Close | Expected Due | Current Stage
Alllike electronics co.,Ltd.奧萊克電子有限公司 | 1M*16 SDR | DVD Player | Discrete | 2012/10/1 | 2012/10/1 | | 2012/10/8 | 2.Expert
Request From | Help Type | Message | Attachment | Action Button
Polo Chen | AVL, Delivery | Message Body of Help : 奧萊克 ,1M*16 SDR Opportunity Level | N/A
Help : Expert's Action Tracking
Help Type | Reply Date | Close Date | Expert | Secretary | Current Stage | Action Button | Action Button
AVL | Dmyuan | Wmhuang | 2.Expert | Close
Delivery | Phleu | Jkchung | 2.Expert | Close
Expand / Collapse
Action Button
Help : Request Attachment List
Upload Date | Upload By | Attachment Desc.
No records to display.
Click detail button to display help detail
Show Request Help -- 網頁對話
Discrete AVL Polo Chen 2012/10/1 2012/10/1 2012/10/8 萊克 ,1M*16 SDR Opportunity Level Dmyuan 2.Expert Detail
Discrete Delivery Polo Chen 2012/10/1 2012/10/1 2012/10/8 Message Body of Help : 奧萊克 ,1M*16 SDR Opportunity Level Phleu 2.Expert Detail
Discrete Pricing Polo Chen 2012/10/4 2012/10/4 2012/10/10 Test Message Body of Activity Level James.sung 2.Expert Detail
Discrete SalesLoop Polo Chen 2012/10/4 2012/10/11 sfasfasfasf Steve Liu 1.SalesHead Detail
Status Description:
0.Sales Apply or Modify Help
1.Waiting for SalesHead Confirm
2.Waiting for Expert and Assignee Reply
2.5.Expert Replied, Wait Sales Confirm
3.Close Help

Current Stage	Action Button
0.Applicant	Modify、Cancel、Submit
1.SalesHead	Confirm、Reject
2.Expert	Forward、Reply、Close
2.5.SalesConfirme	Close、Reject
3.Close	N/A

Sales Portal - My Summary (TAM)

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- **Drill down to Customer's Open Sample Request**

Remaining time : 19:40

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CRM e-Sales Portal -- polochen

Home | Report | Inquery | News | Logout

Search Criteria

Quarter : 2012Q4 Division : ALL Sales Name : ALL Customer :

End Customer Summary

End Customer	Sales	PkgType	Div	Tam (K)	Sam (K)	Share (%)	Target (%)	Activity	OpenHelp	OpenSample	OpenFA
深圳市普聯技術有限公司	Polo Chen	Discrete	D6	8850	2990	34	40			15	
RDA Micro Electronics (Shanghai).INC.銳迪科微電子(上海)有限公司	Polo Chen	KGD	D6	8500	1000	12	40				
共進 (同維)	Polo Chen	Discrete	D6	3420	2130	62	40			41	

Show Sample -- 網頁對話

Doc No	Creation Date	Request Date	Customer	Order Type	Part No	QTY	Current Signer	Status
SAM-20120326002-1	5/8/2012	5/10/2012	Good Moral Limited.	Free Sample	EM6A9160TSA-5G	20	陳榮志	已送樣待客戶回覆
SAM-20120529024-1	7/9/2012	7/10/2012	Good Moral Limited.	Free Sample	EM639165TS-6G	20	陳榮志	已送樣待客戶回覆
SAM-20120612002-1	6/13/2012	6/14/2012	聯發科技股份有限公司	Free Sample	EM6AB160TSD-5G	50	郭蕙茹	已送樣待客戶回覆
SAM-20120613005-1	6/13/2012	6/15/2012	Mediatek(Shenzhen)Inc.	Free Sample	EM6AB160TSD-5G	50	郭蕙茹	已送樣待客戶回覆
SAM-20120718004-1	7/18/2012	7/19/2012	聯發科技股份有限公司	Free Sample	EM6AB160TSD-5G	50	郭蕙茹	已送樣待客戶回覆

Change page: 1 2 Displaying page 2 of 2, items 11 to 15 of 15.

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Sales Portal - My Summary (TAM)

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- **Drill down to Customer's Open Sample Request**

Sales Portal - My Summary (TAM)

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- **Drill down to Customer's Open FA Case**

Remaining time : 19:58

CRM e-Sales Portal -- steveliu

Home | Report | Inquery | News | Logout

Search Criteria

Quarter : 2012Q4 Division : ALL Sales Name : ALL Customer :

End Customer Summary

End Customer	Sales	PkgType	Div	Tam (K)	Sam (K)	Share (%)	Target (%)	Activity	OpenHelp	OpenSample	OpenFA
東訊股份有限公司	Steve Liu	Discrete	D1							69	2
中磊電子股份有限公司	Alvin Shih	Discrete	D1	2996	1795	60	50			29	1
深圳市普聯技術有限公司	Polo Chen	Discrete	D6	8850	2990	34	40		1	15	

Show CE Case -- 網頁對話

Doc No	Creation Date	Claim Type	Applicant	Case No	Part No	Application	Chipset ID	Current Signer	Status
CE120904-1	9/6/2012	Line Fail	張正宜	東訊-120901	EM63A165TS-6G	Router	RT3052	董文生,陳健忠	轉簽FAE
CE120904-1	9/6/2012	Line Fail	張正宜	東訊-120901	EM63A165TS-6G	Router	RT3052	董文生,陳健忠	轉簽FAE

Sales Portal - My Summary (TAM)

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- **Drill down to Customer's Open FA Case**

Sales Portal – Opportunity / Activity

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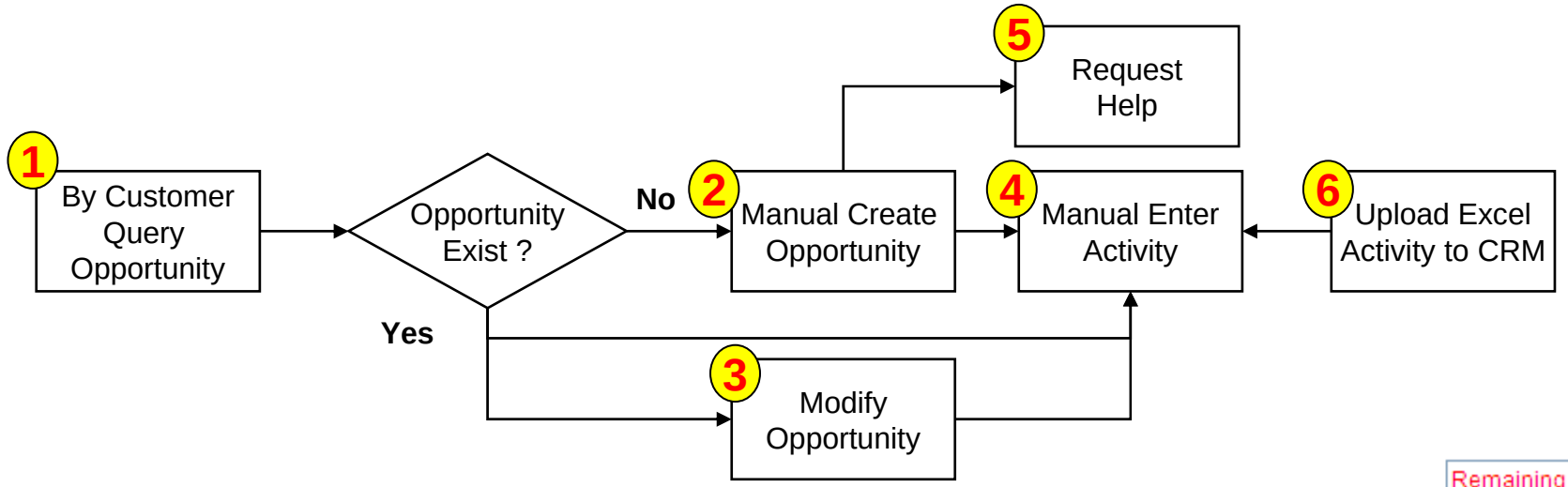

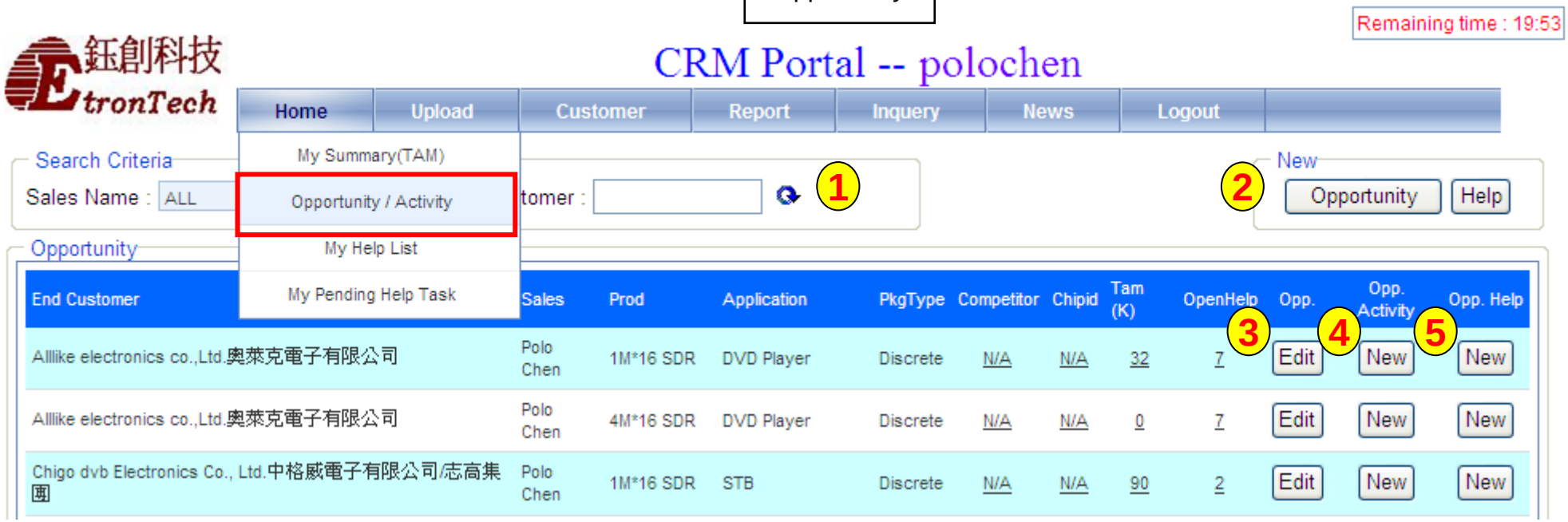

6 Please refer to Upload→Excel Activity Upload

Sales Portal – Opportunity / Activity

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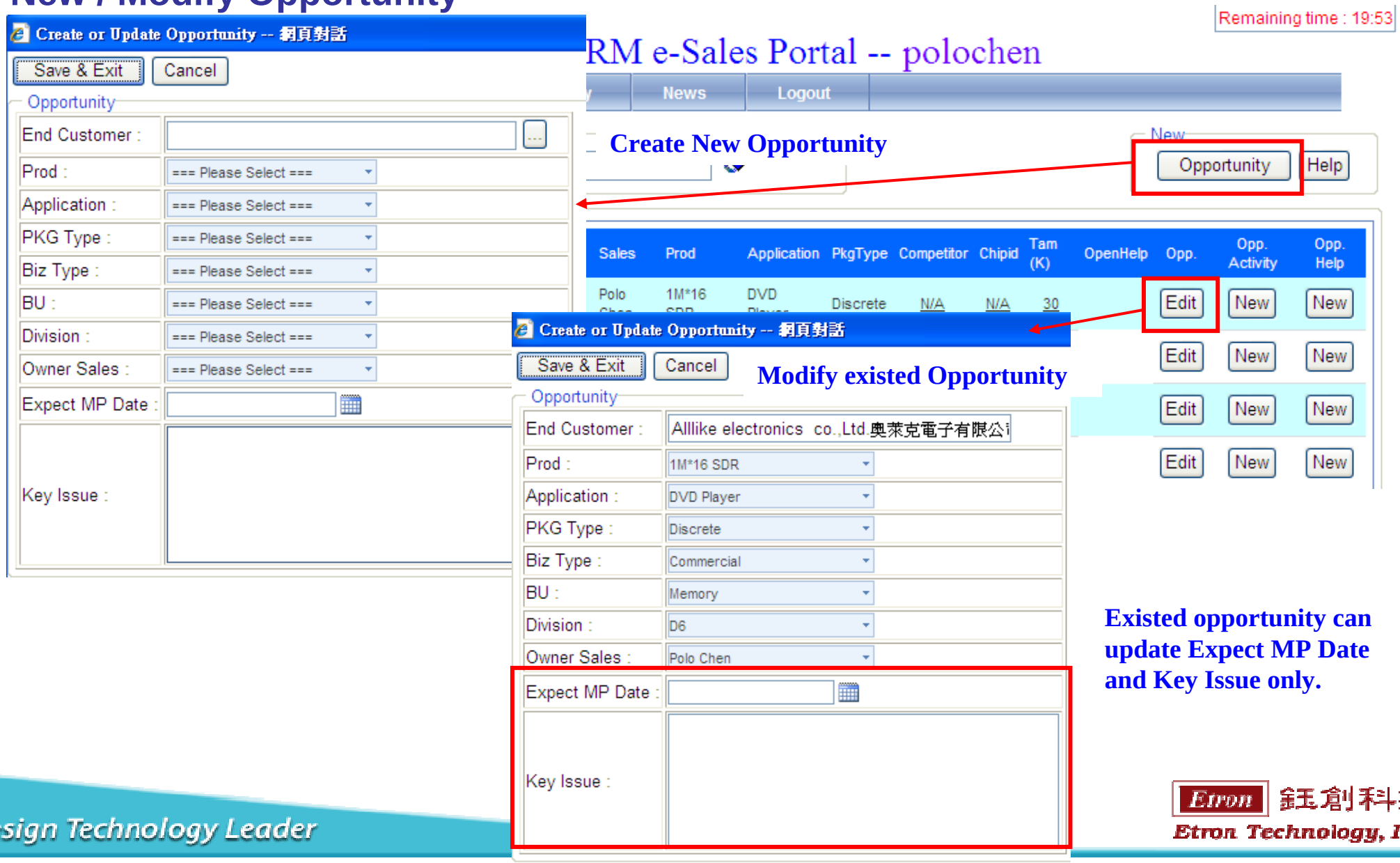
- New / Modify Opportunity



Sales Portal – Opportunity / Activity

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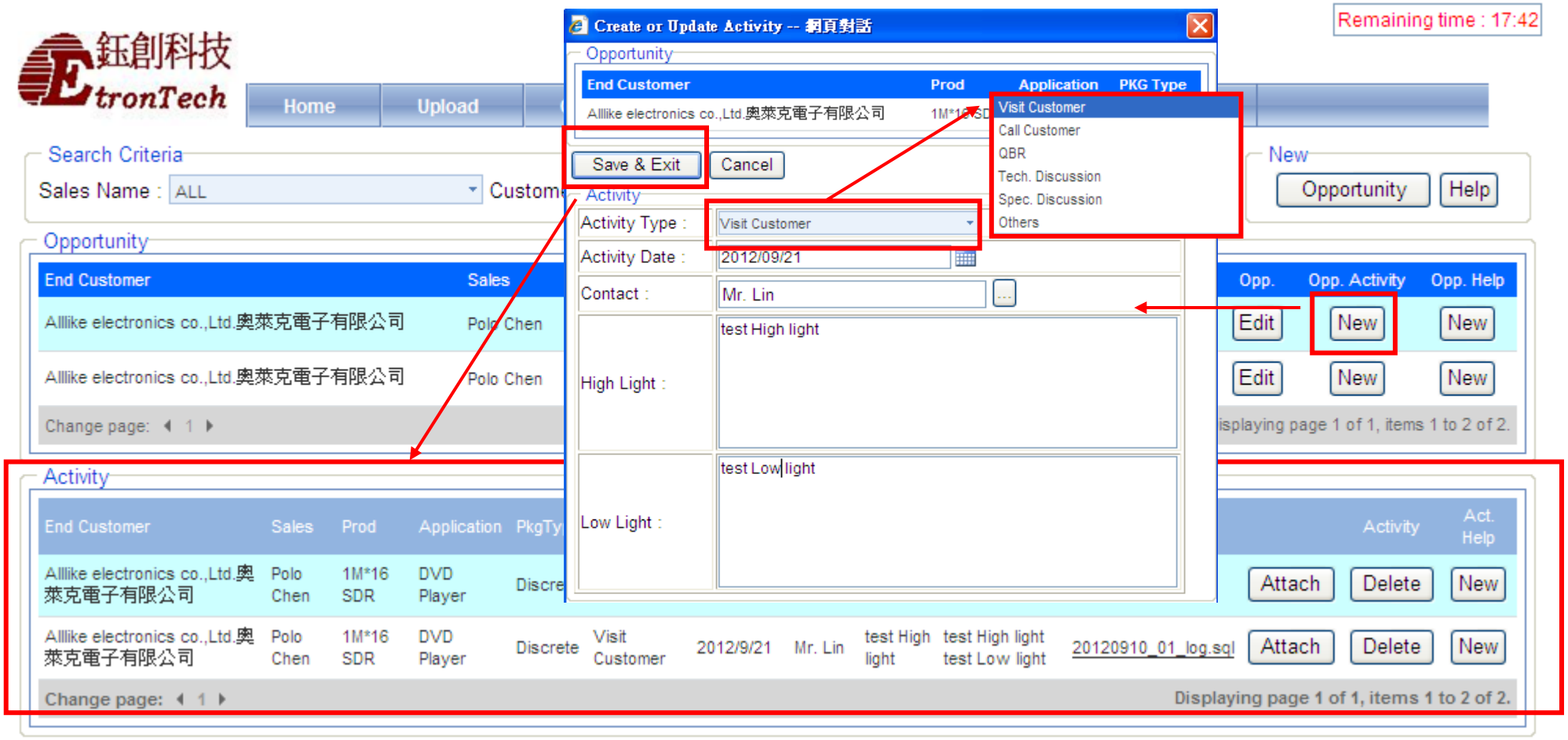
- New Activity / Query Activity



Save Activity, tnen you can query the activity in “Activity block” under the “Opportunity block”

Sales Portal – Opportunity / Activity

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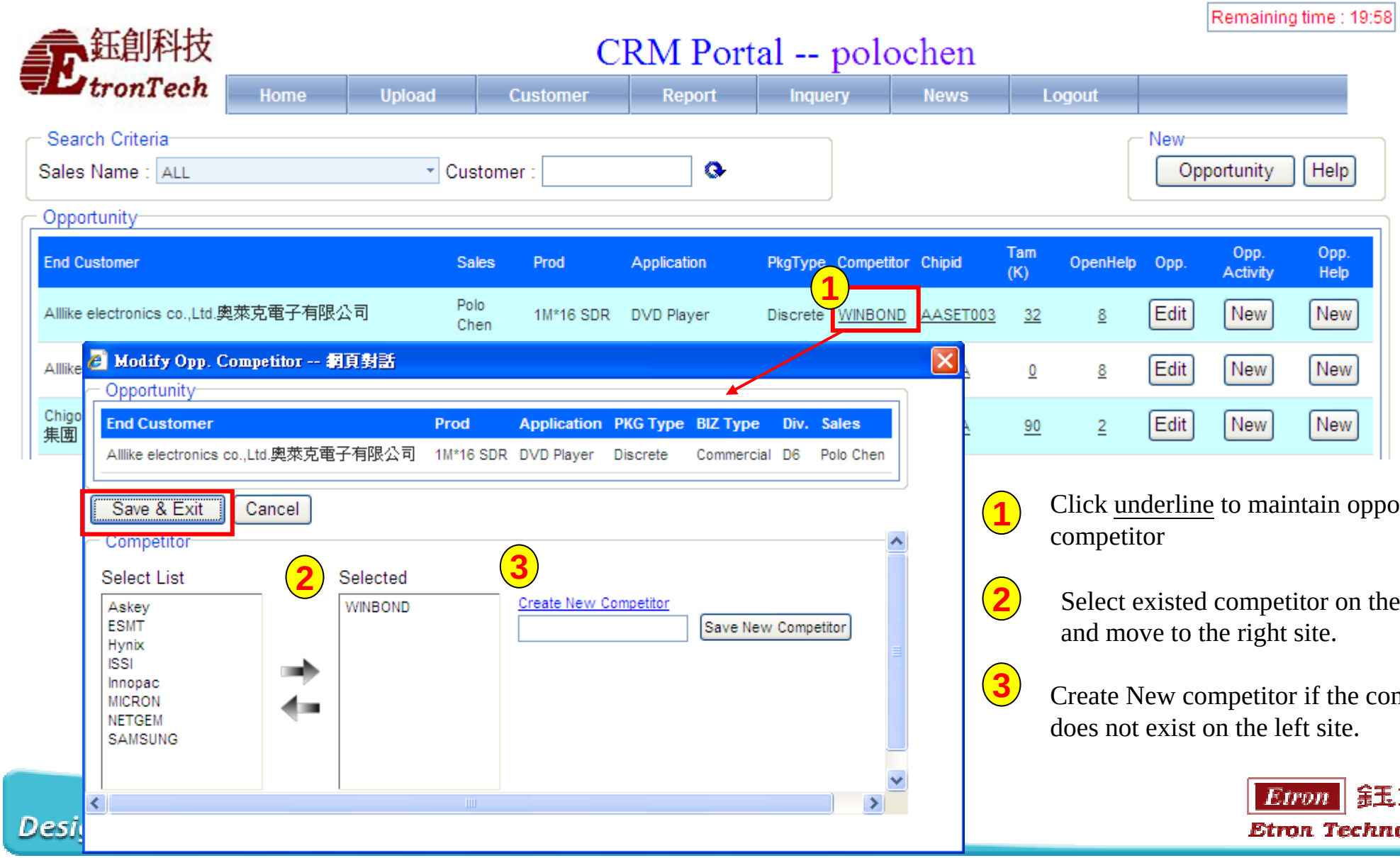
Maintain Competitor



1. Click underline to maintain opportunity's competitor
2. Select existed competitor on the left site and move to the right site.
3. Create New competitor if the competitor does not exist on the left site.

Sales Portal – Opportunity / Activity

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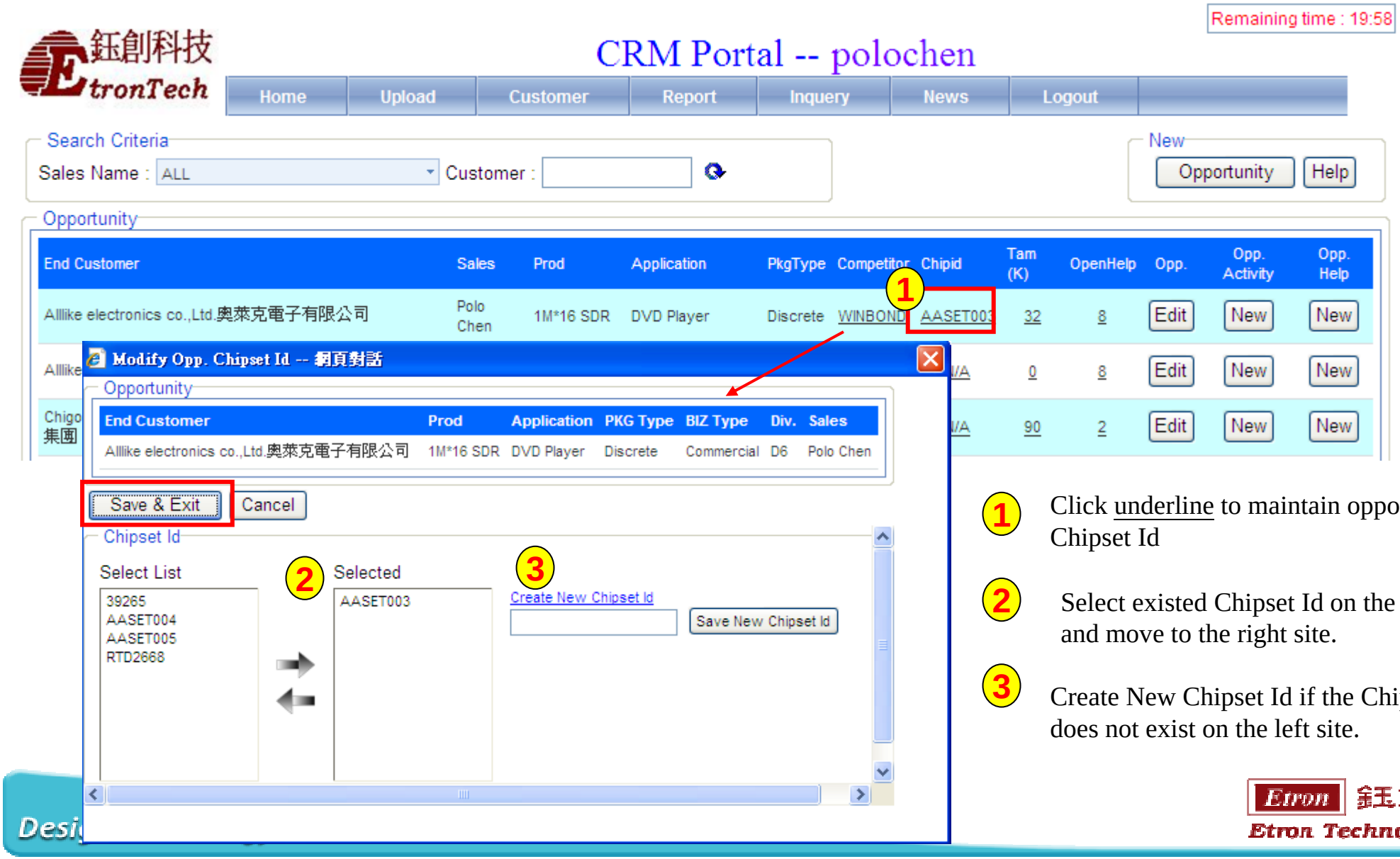
Maintain Chipset Id



1. Click underline to maintain opportunity's Chipset Id
2. Select existed Chipset Id on the left site and move to the right site.
3. Create New Chipset Id if the Chipset Id does not exist on the left site.

Sales Portal – Request Help

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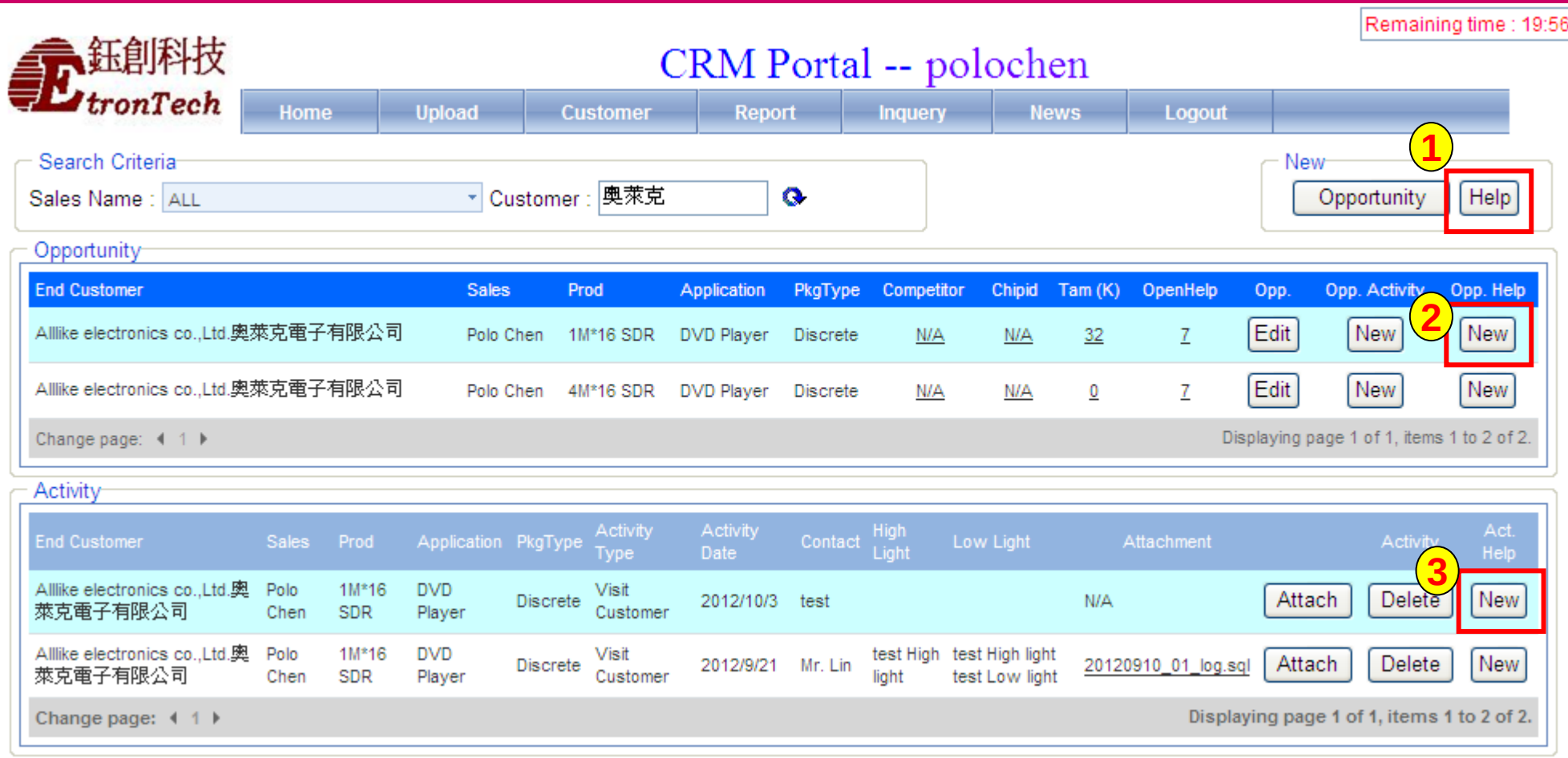
Remaining time : 19:56
CRM Portal -- polochen
Home
Upload
Customer
Report
Inquery
News
Logout
Search Criteria
Sales Name : ALL
Customer : 奧萊克
New
Opportunity
Help
1
Opportunity
End Customer | Sales | Prod | Application | PkgType | Competitor | Chipid | Tam (K) | OpenHelp | Opp. | Opp. Activity | Opp. Help
Alllike electronics co.,Ltd.奧萊克電子有限公司 | Polo Chen | 1M*16 SDR | DVD Player | Discrete | N/A | N/A | 32 | 7 | Edit | New | New
Alllike electronics co.,Ltd.奧萊克電子有限公司 | Polo Chen | 4M*16 SDR | DVD Player | Discrete | N/A | N/A | 0 | 7 | Edit | New | New
Change page: 1
Displaying page 1 of 1, items 1 to 2 of 2.
2
Activity
End Customer | Sales | Prod | Application | PkgType | Activity Type | Activity Date | Contact | High Light | Low Light | Attachment | Activity | Act. Help
Alllike electronics co.,Ltd.奧萊克電子有限公司 | Polo Chen | 1M*16 SDR | DVD Player | Discrete | Visit Customer | 2012/10/3 | test | | | N/A | Attach | Delete | New
Alllike electronics co.,Ltd.奧萊克電子有限公司 | Polo Chen | 1M*16 SDR | DVD Player | Discrete | Visit Customer | 2012/9/21 | Mr. Lin | test High light | test High light test Low light | 20120910_01_log.sql | Attach | Delete | New
Change page: 1
Displaying page 1 of 1, items 1 to 2 of 2.
3

You can request help in 3 manners

1. Customer Level
2. Opportunity Level
3. Activity Level

Sales Portal – Request Help

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Customer Level

	Expert	Secretary
NewProd	DM	WM
FA	Mickey	Vicent
AVL	DM	WM
Delivery	David	Peter
Pricing	James	Kate

1. Select Customer
2. Select Help Type
3. Once help type has been selected, display Expert and Secretary automatically.
4. Enter Mail Subject and Message Body of Help
5. Attachment
6. Enter expected due date

Sales Portal – Request Help

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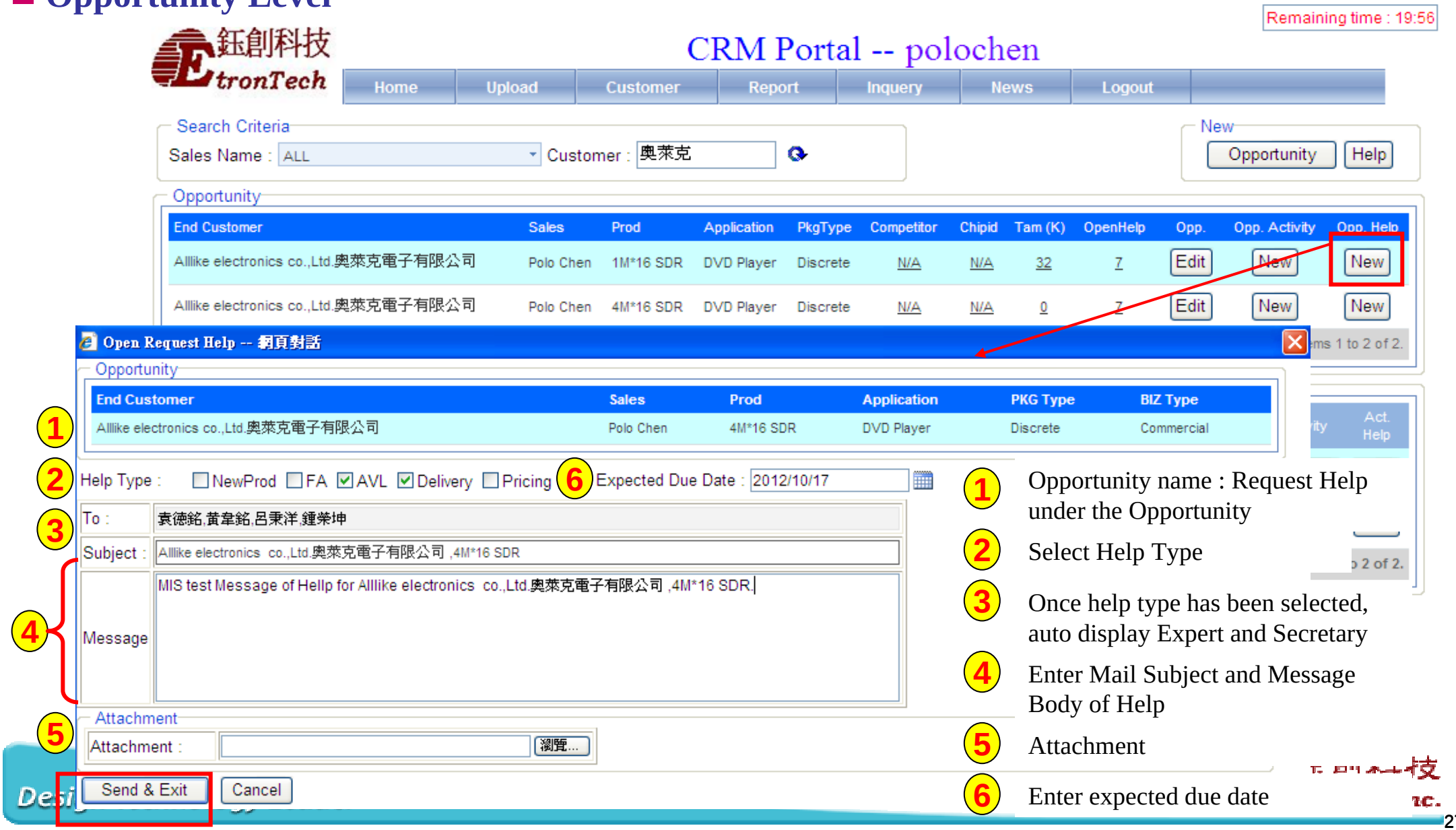
Opportunity Level



1. Opportunity name : Request Help under the Opportunity
2. Select Help Type
3. Once help type has been selected, auto display Expert and Secretary
4. Enter Mail Subject and Message Body of Help
5. Attachment
6. Enter expected due date

Sales Portal – Request Help

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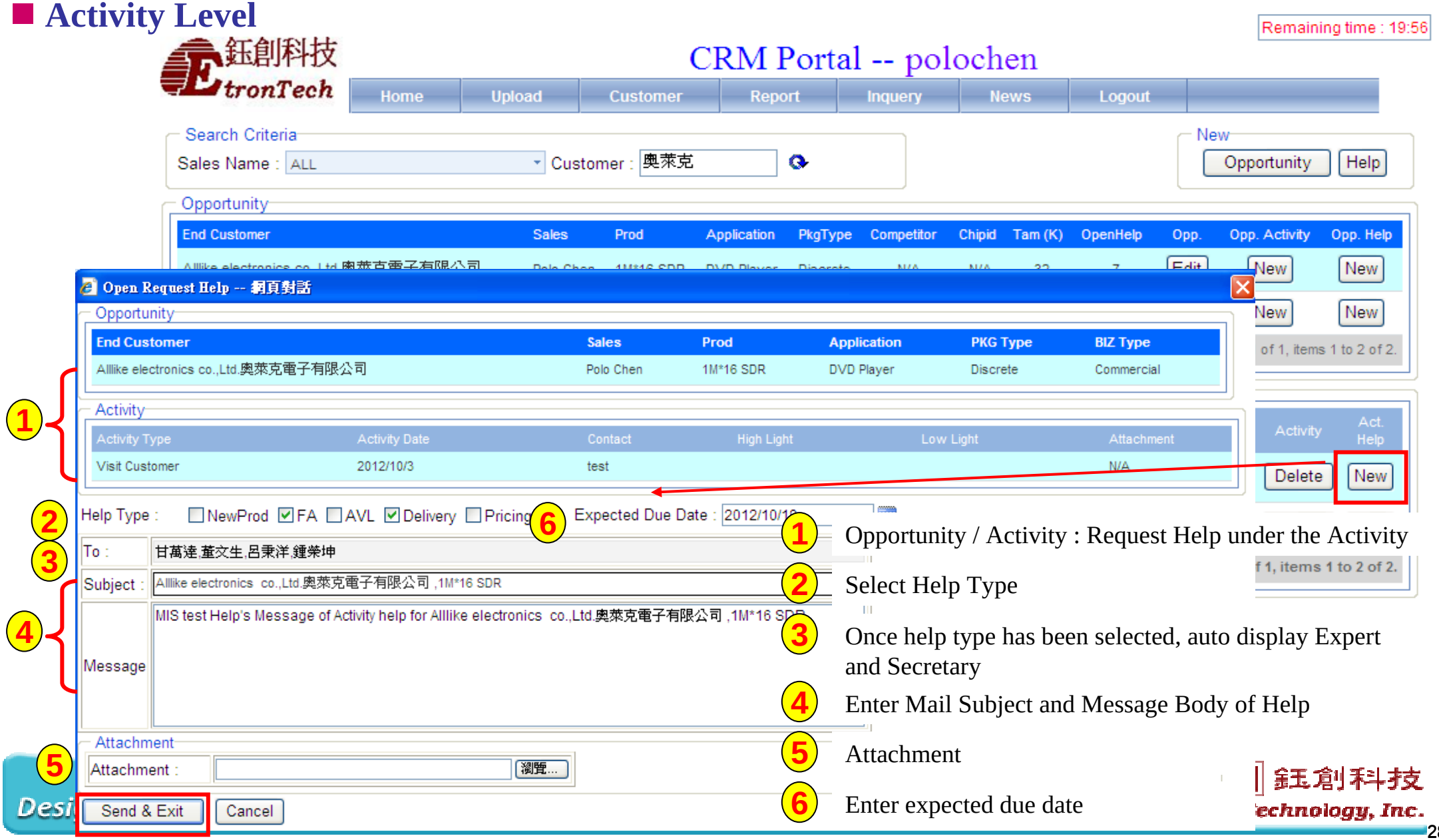
Activity Level



1. Opportunity / Activity : Request Help under the Activity
2. Select Help Type
3. Once help type has been selected, auto display Expert and Secretary
4. Enter Mail Subject and Message Body of Help
5. Attachment
6. Enter expected due date

Sales Portal – My Help List

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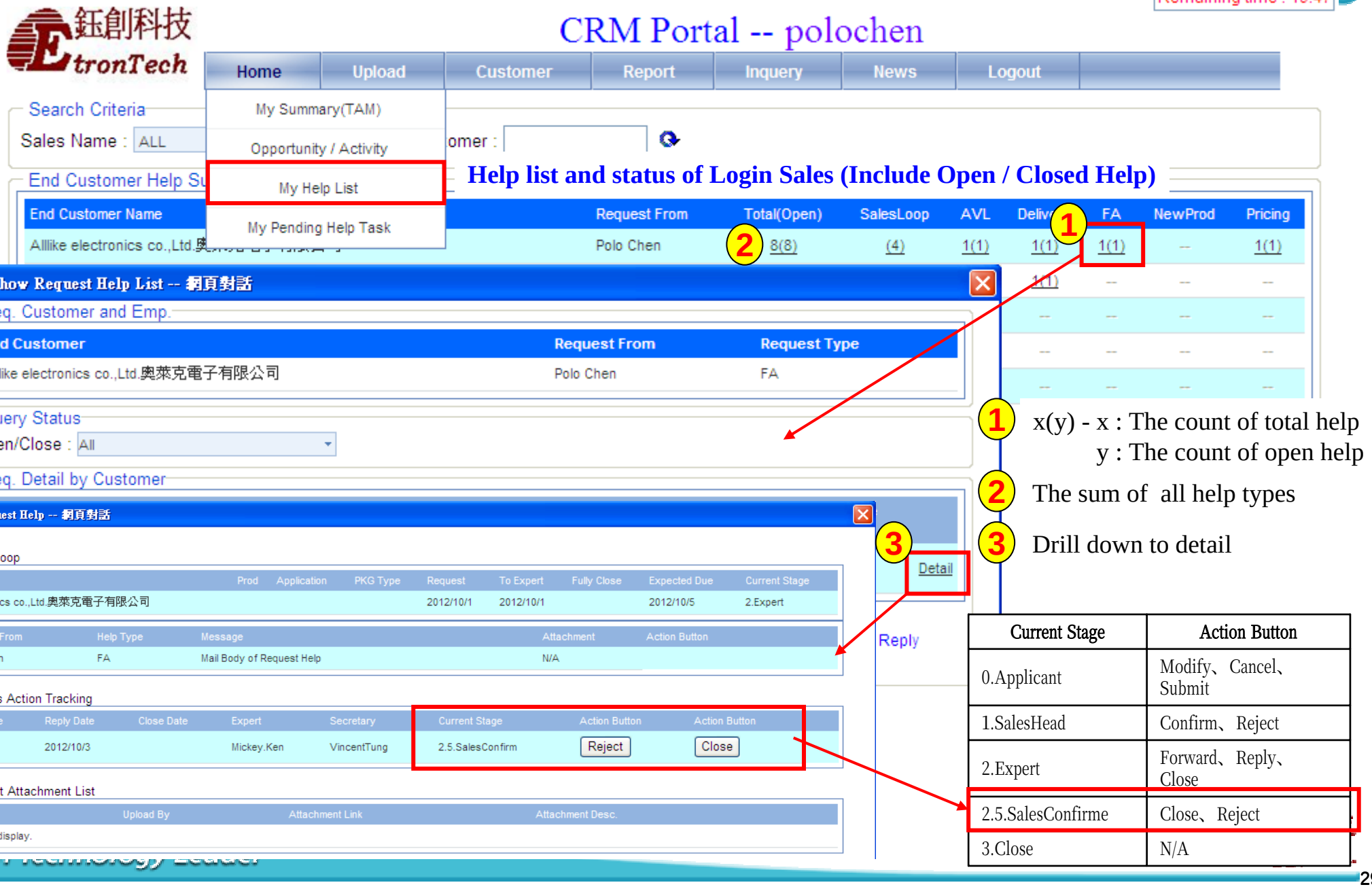
Remaining time : 19:47



1 x(y) - x : The count of total help
y : The count of open help

2 The sum of all help types

3 Drill down to detail

Current Stage	Action Button
0.Applicant	Modify、Cancel、Submit
1.SalesHead	Confirm、Reject
2.Expert	Forward、Reply、Close
2.5.SalesConfirme	Close、Reject
3.Close	N/A

Sales Portal – My Pending Help Task

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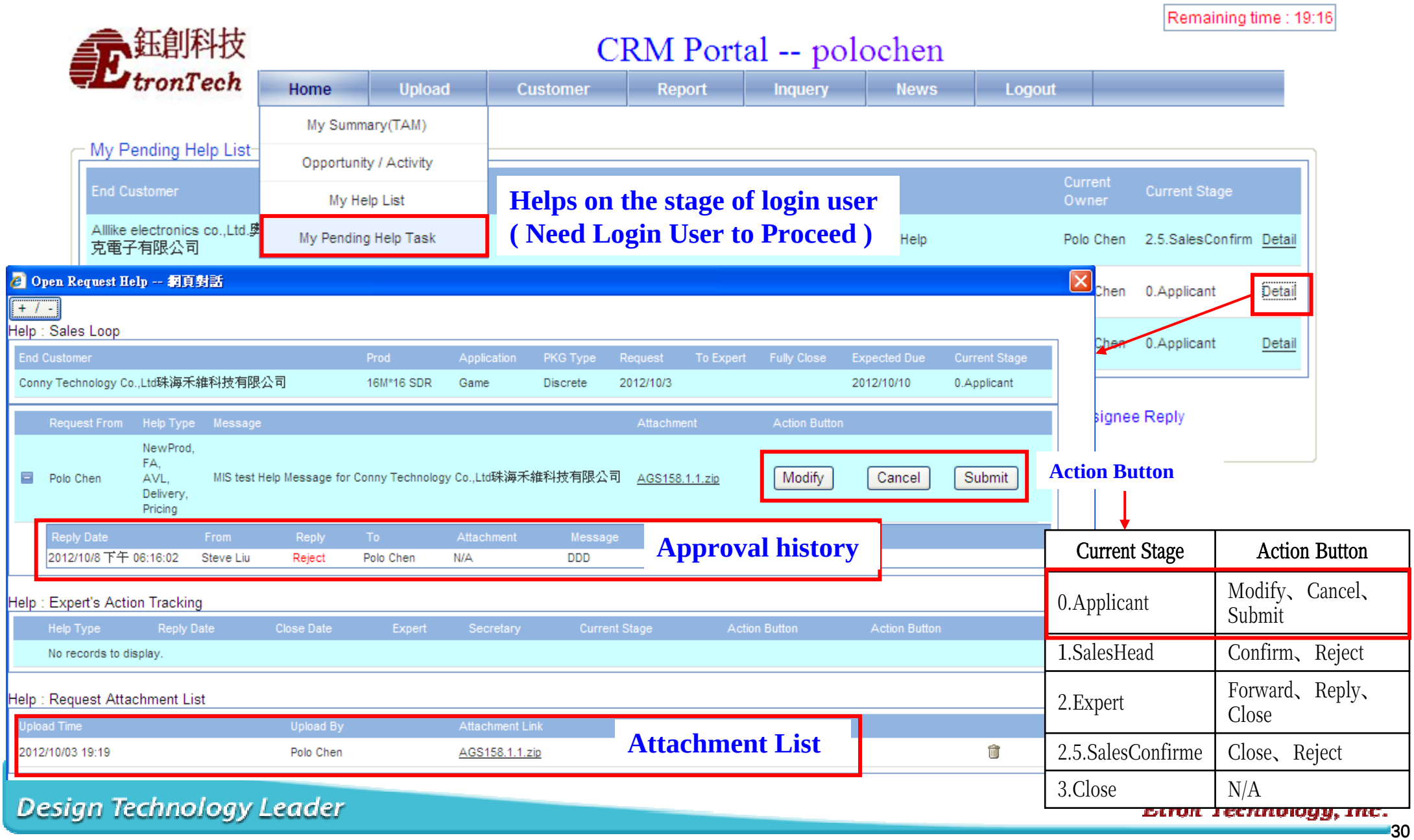

Current Stage	Action Button
0.Applicant	Modify、Cancel、Submit
1.SalesHead	Confirm、Reject
2.Expert	Forward、Reply、Close
2.5.SalesConfirme	Close、Reject
3.Close	N/A

Sales Portal – My Pending Help Task

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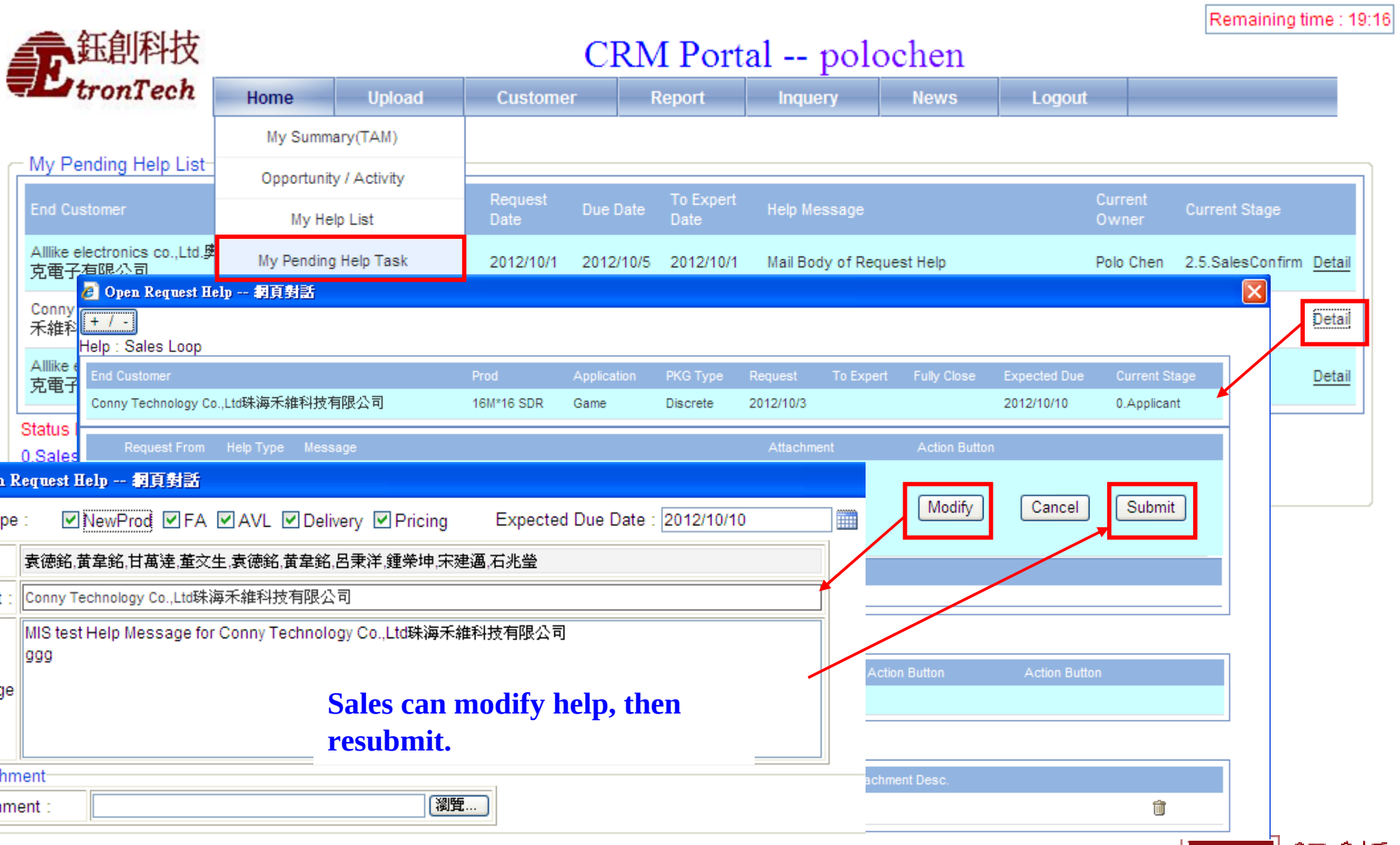

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Sales Portal - Upload

Sales Portal – Excel Activity Upload

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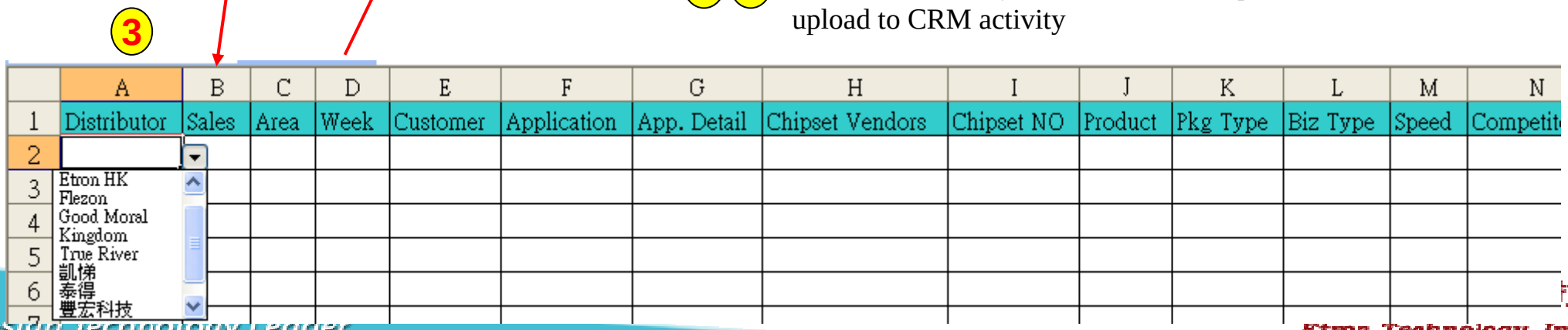
Remaining time : 19:45
Excel Activity Upload
Excel TAM Upload
Upload Customer Report
ortal -- polochen
Home
Upload
Inquery
News
Logout
1
Sales Name : Polo Chen
Excel Activity Upload
Brand New Excel Format
Download
2
4
Upload Excel Format Activity
瀏覽...
Upload
5
Distributor Sales Area Week Customer Application App. Detail Chipset Vendors Chipset NO Product Biz Type Pkg Type Speed Competitors Activity Date Activity Type Contact Who High Light Low Light
豐宏科技 Polo Chen CN Q39 金運 Car Car DVD 中磊 RTD2668 16M*16 SDR Commercial Discrete 6G Innopac 2012/9/23 Visit Customer Mr. Lin test 1 test 2

1 2 Select Sales Name → Download Empty Template

3 Enter Activity in Excel file

4 5 Find Excel file in your PC or NB → Upload → upload to CRM activity


3
A B C D E F G H I J K L M N
Distributor Sales Area Week Customer Application App. Detail Chipset Vendors Chipset NO Product Pkg Type Biz Type Speed Competit
Etron HK
Flezon
Good Moral
Kingdom
True River
凱悌
泰得
豐宏科技

Sales Portal – Excel TAM Upload

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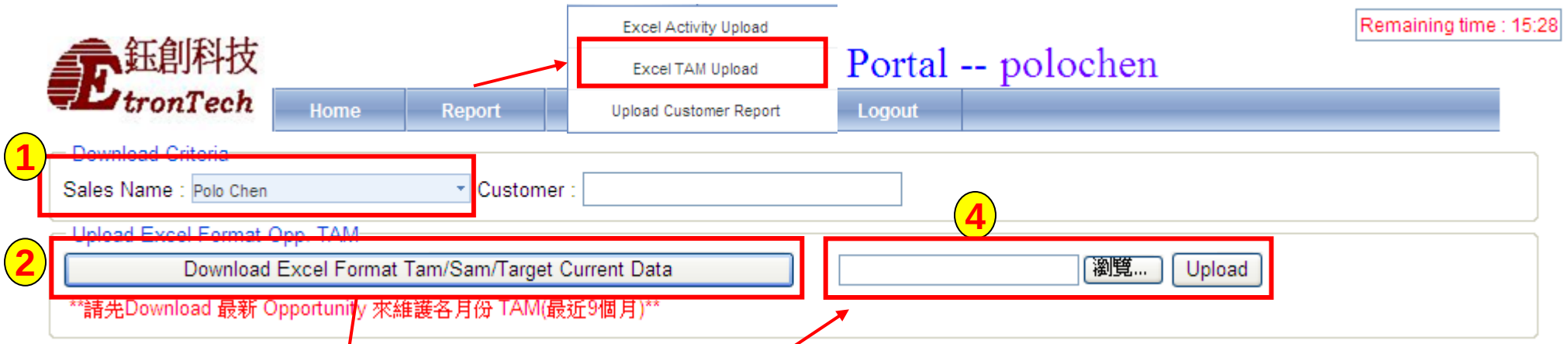

1 2 Select Sales Name → Download Template

3 Fill in TAM data of the field in yellow

4 Find Excel file → Upload → update CRM TAM

3

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1								201210				201211				201212		
2	Opp_Id	End User	Div	Sales	Opportunity	Application	Pkg Type	TAM	SAM	Share%	**Target %**	TAM	SAM	Share%	**Target %**	TAM	SAM	Share%
3	290	Alllike electronics co.,Ltd.奧	D6	Polo Chen	1M*16 SDR	DVD Player	Discrete	10	10	100.00%	40	10	10	100.00%	40	10	10	100.009
4	289	Alllike electronics co.,Ltd.奧	D6	Polo Chen	4M*16 SDR	DVD Player	Discrete	0	10	#DIV/0!	0	0	10	#DIV/0!	0	0	10	#DIV/0!
5	3822	Best Work Enterprise Limited	D6	Polo Chen	1M*16 SDR	DVD Player	Discrete	0	0	#DIV/0!	0	0	0	#DIV/0!	0	0	0	#DIV/0!
6	3823	Best Work Enterprise Limited	D6	Polo Chen	4M*16 SDR	DVD Player	Discrete	0	0	#DIV/0!	0	0	0	#DIV/0!	0	0	0	#DIV/0!

Sales Portal – Upload Customer Report

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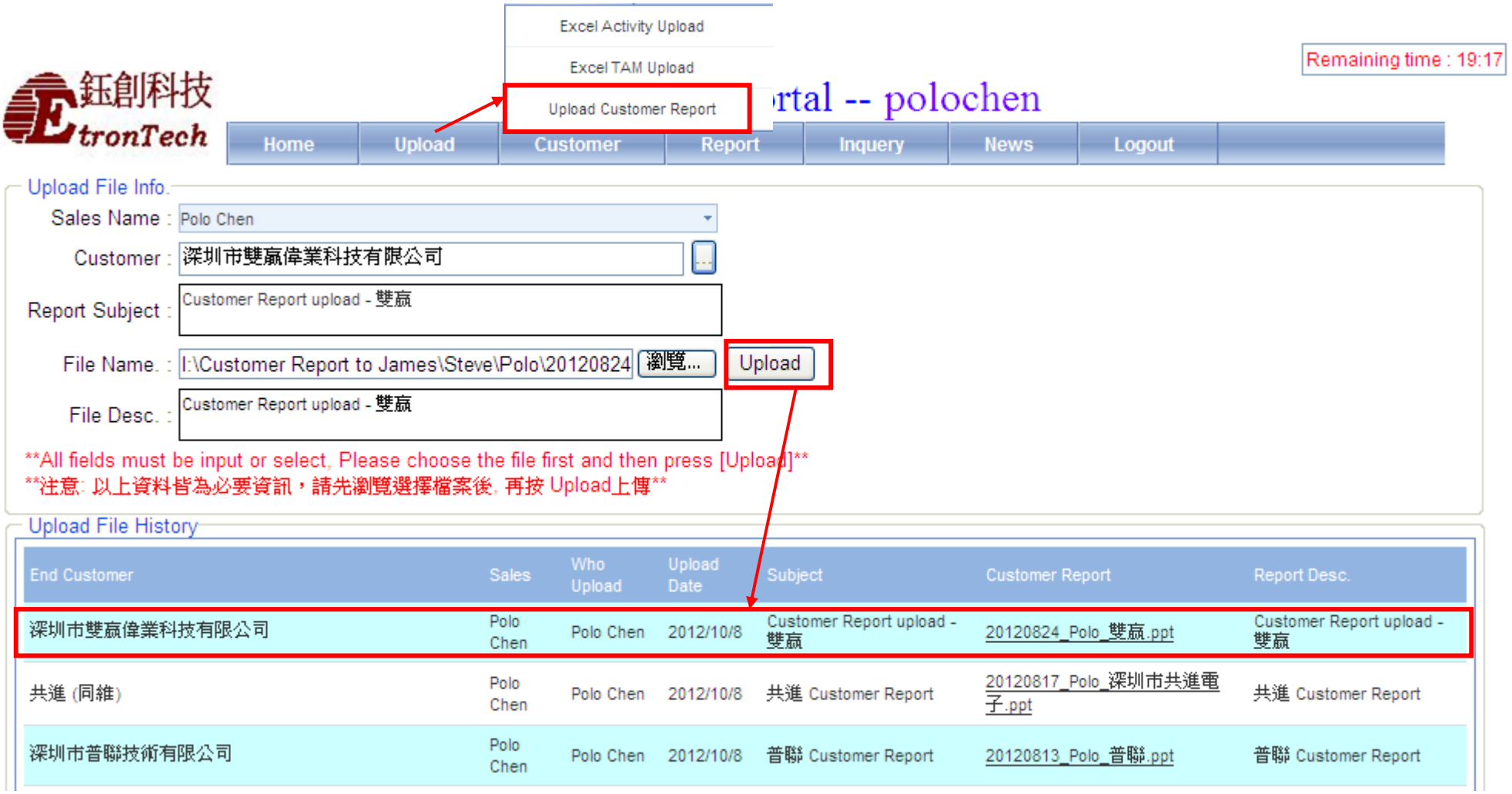

Sales Portal – Query Customer Report

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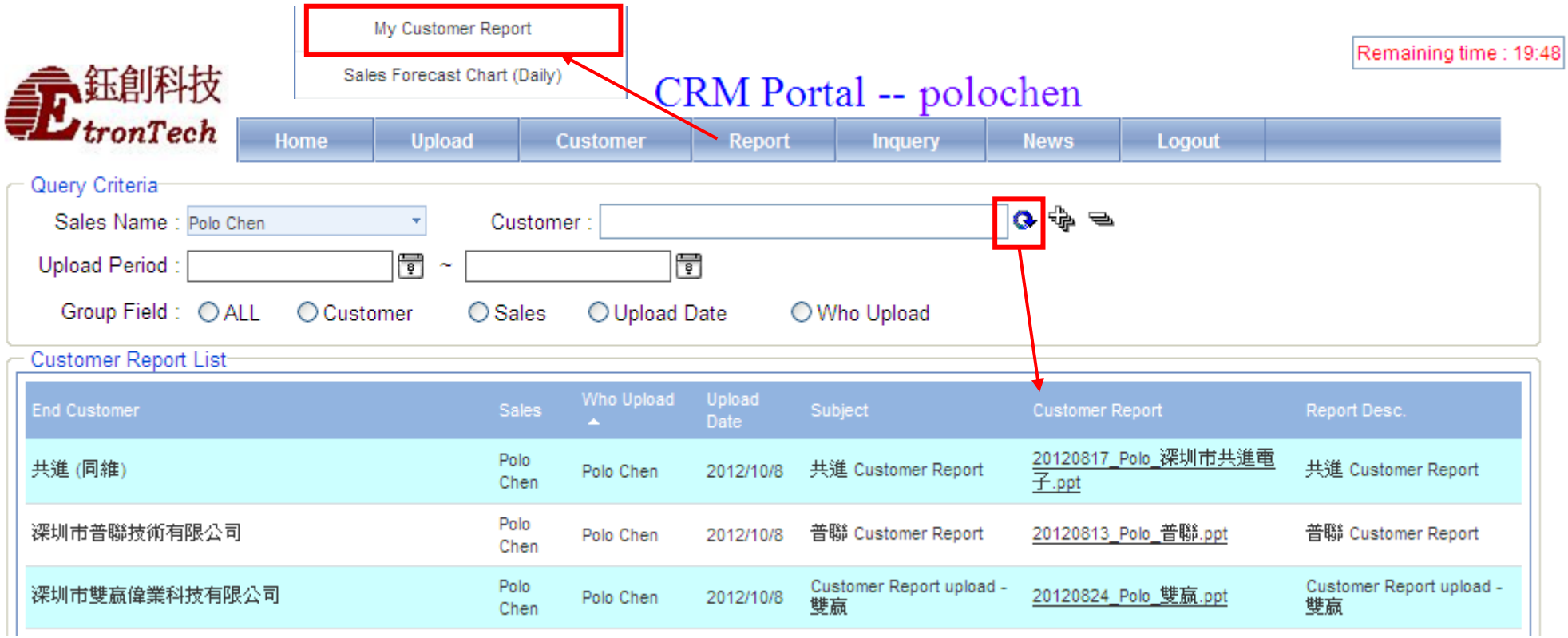

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Sales Portal - Customer

Sales Portal – Create Potential Customer

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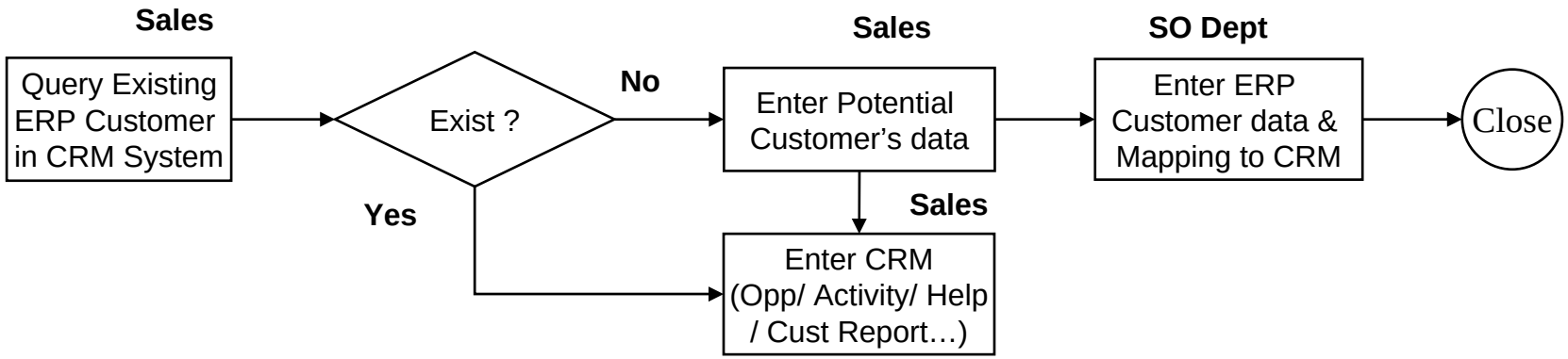

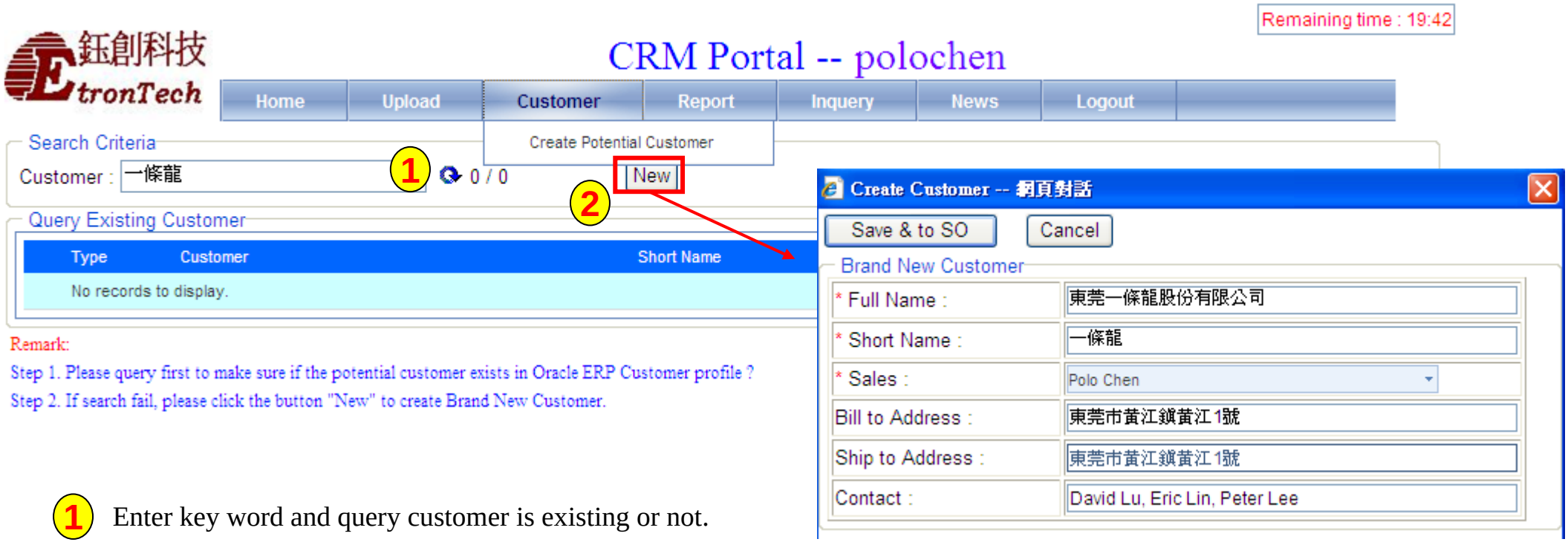

1. Enter key word and query customer is existing or not.
2. If customer is not existing, click the button "New" to create a new customer.

Mail Notification – To Sales Operation Dept.

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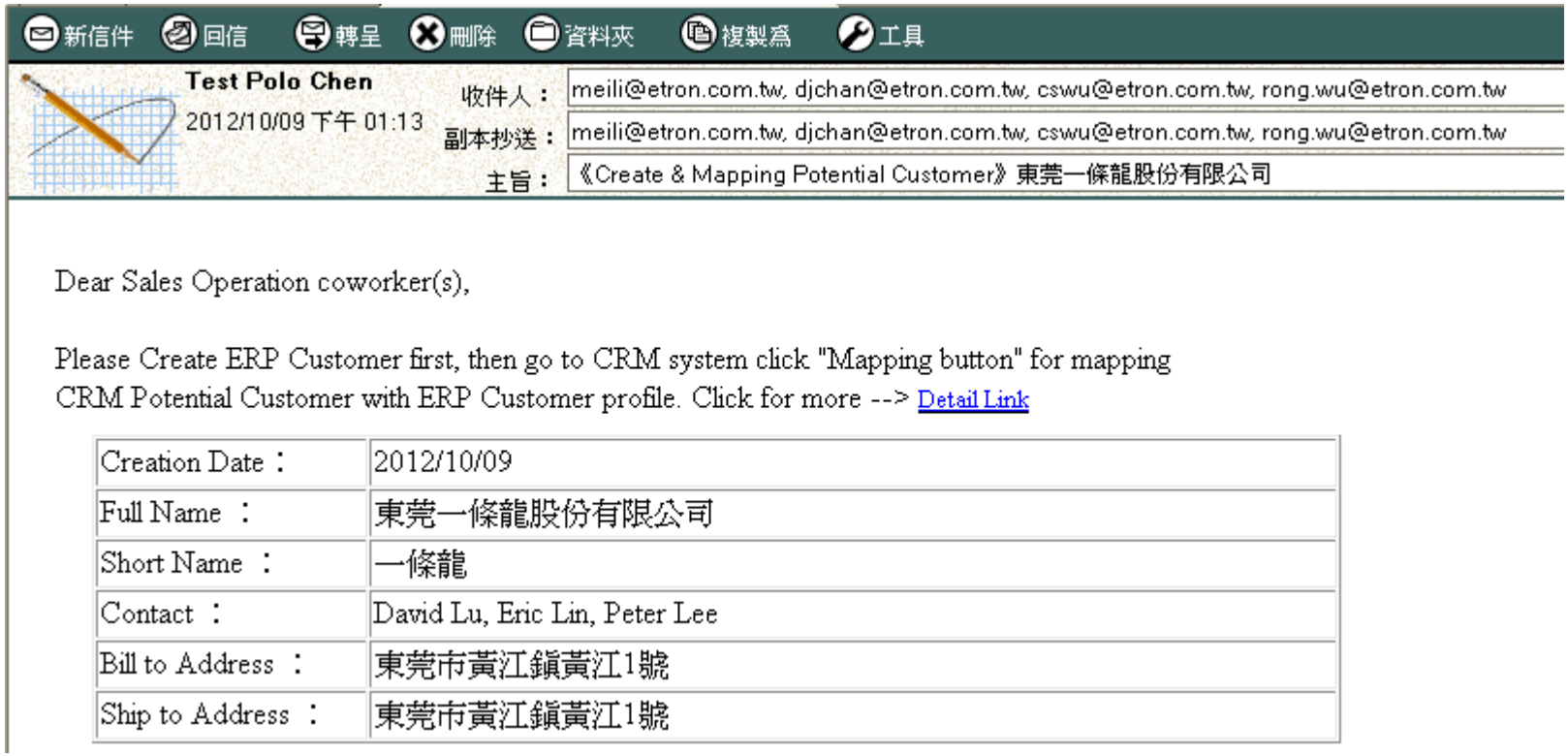

新信件 回信 轉呈 刪除 資料夾 複製爲 工具

Test Polo Chen
2012/10/09 下午 01:13

收件人： meili@etron.com.tw, djchan@etron.com.tw, cswu@etron.com.tw, rong.wu@etron.com.tw
副本抄送： meili@etron.com.tw, djchan@etron.com.tw, cswu@etron.com.tw, rong.wu@etron.com.tw
主旨： 《Create & Mapping Potential Customer》東莞一條龍股份有限公司

Dear Sales Operation coworker(s),

Please Create ERP Customer first, then go to CRM system click "Mapping button" for mapping CRM Potential Customer with ERP Customer profile. Click for more --> Detail Link

Creation Date：	2012/10/09
Full Name ：	東莞一條龍股份有限公司
Short Name ：	一條龍
Contact ：	David Lu, Eric Lin, Peter Lee
Bill to Address ：	東莞市黃江鎮黃江1號
Ship to Address ：	東莞市黃江鎮黃江1號

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Sales Operation Dept. Portal

Sales Operation Dept. Portal – Mapping Customer

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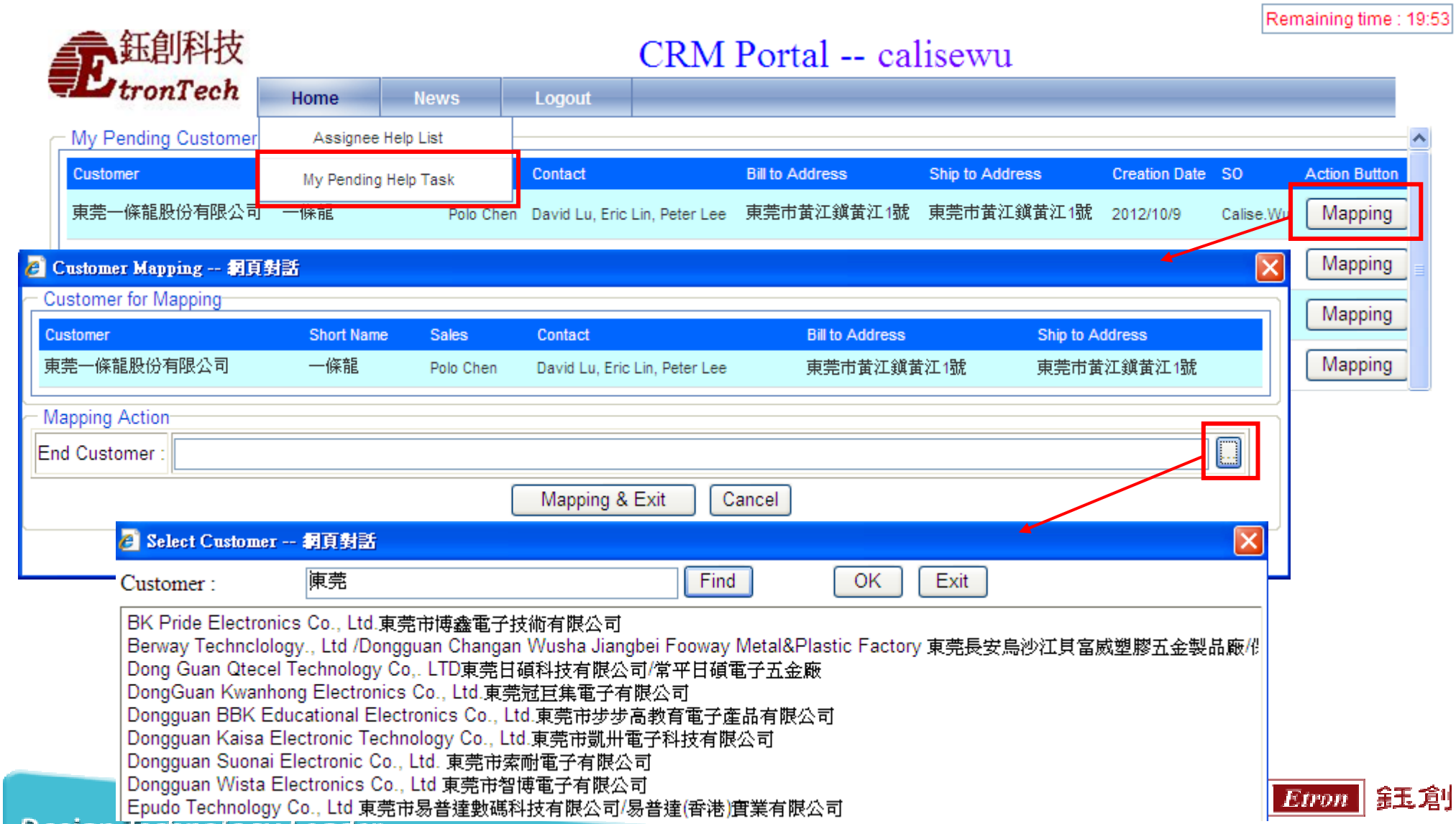

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Sales Head Portal

Sales Head Portal

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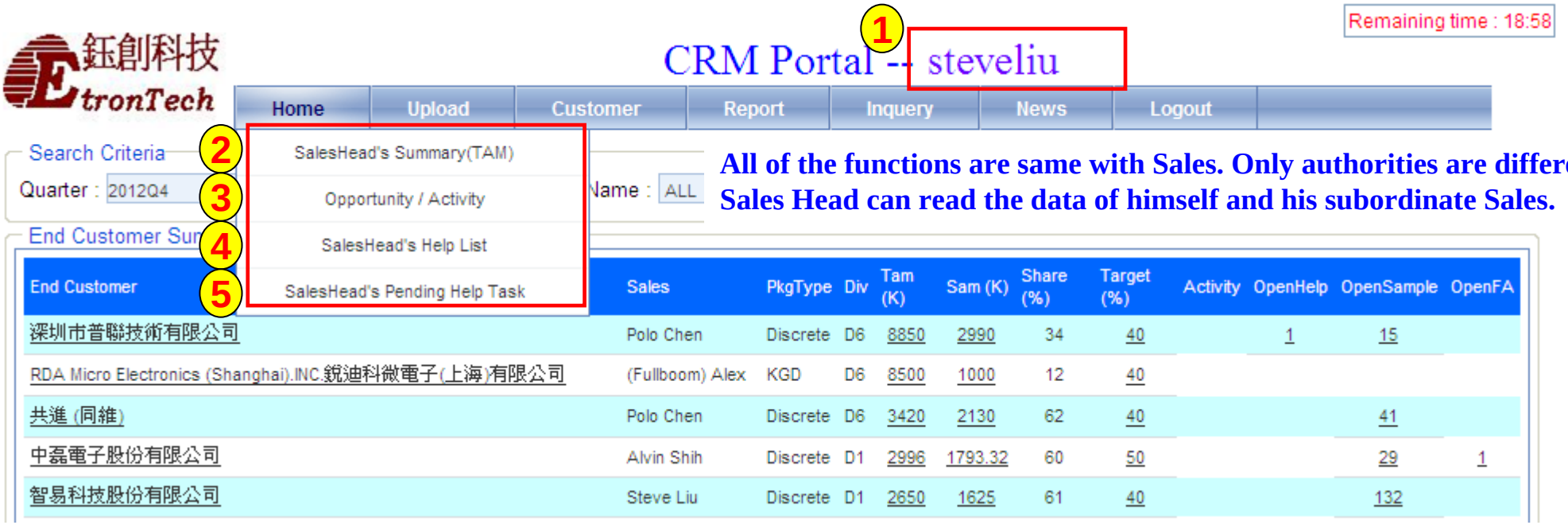

All of the functions are same with Sales. Only authorities are different. Sales Head can read the data of himself and his subordinate Sales.

1. Sales Head Name
2. Summary Report : Default page, include TAM/SAM…data
3. Maintain opportunity, activity
4. Help list and status of Login Sales Head (Include Open / Closed Help)
5. Helps on the stage of login Sales Head

Mail Notification

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新信件 回信 轉呈 刪除 資料夾 複製爲 工具

Polo Chen
2012/10/02 下午 11:19

收件人： meili@notes-smtp.etron.com.tw, djchan@notes-smtp.etron.com.tw, cswu@notes-smtp.etron.com.tw, rong.wu@notes-smtp.etron.com.tw

副本抄送： meili@notes-smtp.etron.com.tw, djchan@notes-smtp.etron.com.tw, cswu@notes-smtp.etron.com.tw, rong.wu@notes-smtp.etron.com.tw

主旨： Request：《Help》深圳市普聯技術有限公司 ,1M*16 SDR

Dear Sir,

Polo Chen request help for 深圳市普聯技術有限公司 Detail Link
Please link to CRM system to reply the request Thank you !!

Request Date：	2012/10/01
Expected Due：	2012/10/24
Current Status：	1.Waiting for SalesHead Confirm
Product：	1M*16 SDR
Application：	Cable Router
Pkg Type：	Discrete
Biz Type：	Commercial
Regarding ：	AVL
Content：	test2

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Expert's Portal

Expert's Portal

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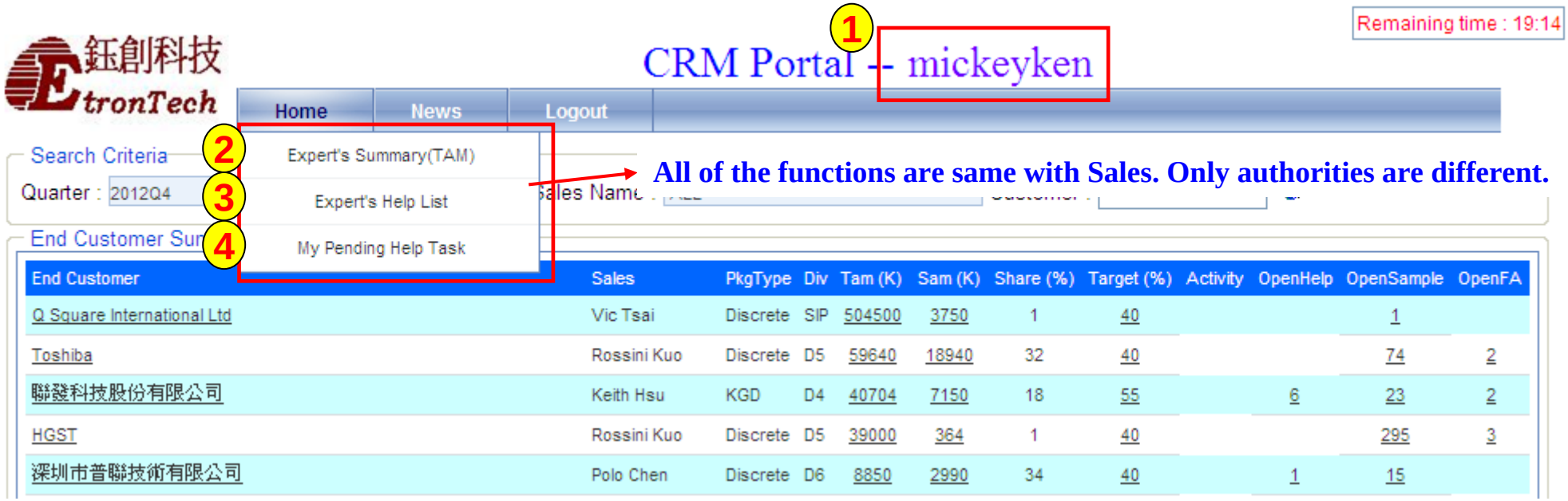
Remaining time : 19:14
1
CRM Portal -- mickeyken
Home
News
Logout
2
Expert's Summary(TAM)
3
Expert's Help List
4
My Pending Help Task
All of the functions are same with Sales. Only authorities are different.
Search Criteria
Quarter : 2012Q4
End Customer Sur
End Customer | Sales | PkgType | Div | Tam (K) | Sam (K) | Share (%) | Target (%) | Activity | OpenHelp | OpenSample | OpenFA
Q Square International Ltd | Vic Tsai | Discrete | SIP | 504500 | 3750 | 1 | 40 | | | 1 |
Toshiba | Rossini Kuo | Discrete | D5 | 59640 | 18940 | 32 | 40 | | | 74 | 2
聯發科技股份有限公司 | Keith Hsu | KGD | D4 | 40704 | 7150 | 18 | 55 | | 6 | 23 | 2
HGST | Rossini Kuo | Discrete | D5 | 39000 | 364 | 1 | 40 | | | 295 | 3
深圳市普聯技術有限公司 | Polo Chen | Discrete | D6 | 8850 | 2990 | 34 | 40 | | 1 | 15 |

1. Expert's Name
2. Summary Report : Default page, include TAM/SAM…data
   Expert can read all of the sales summary report
3. Expert can read all of the help except price type (Include Open / Closed Help)
   .
4. Helps on the stage of login Expert

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Assignee's Portal

Assignee's Portal

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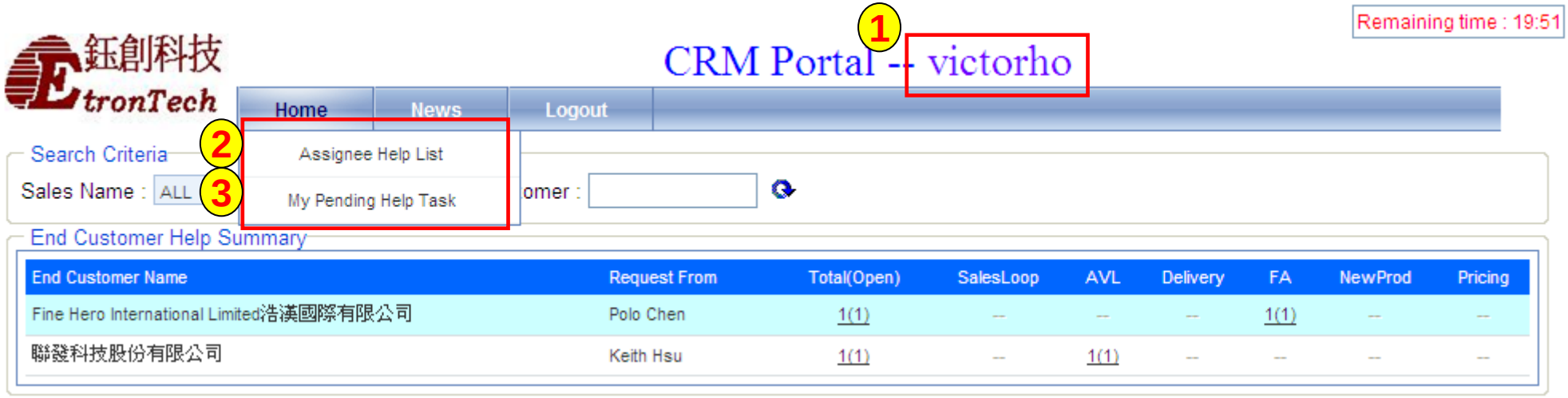

1. Assignee's Name
2. Query helps has been assigned to the assignee. (Include Open / Closed Help)
3. Helps on the Assignee's stage

Sales Operation Dept. Portal – Mapping Customer

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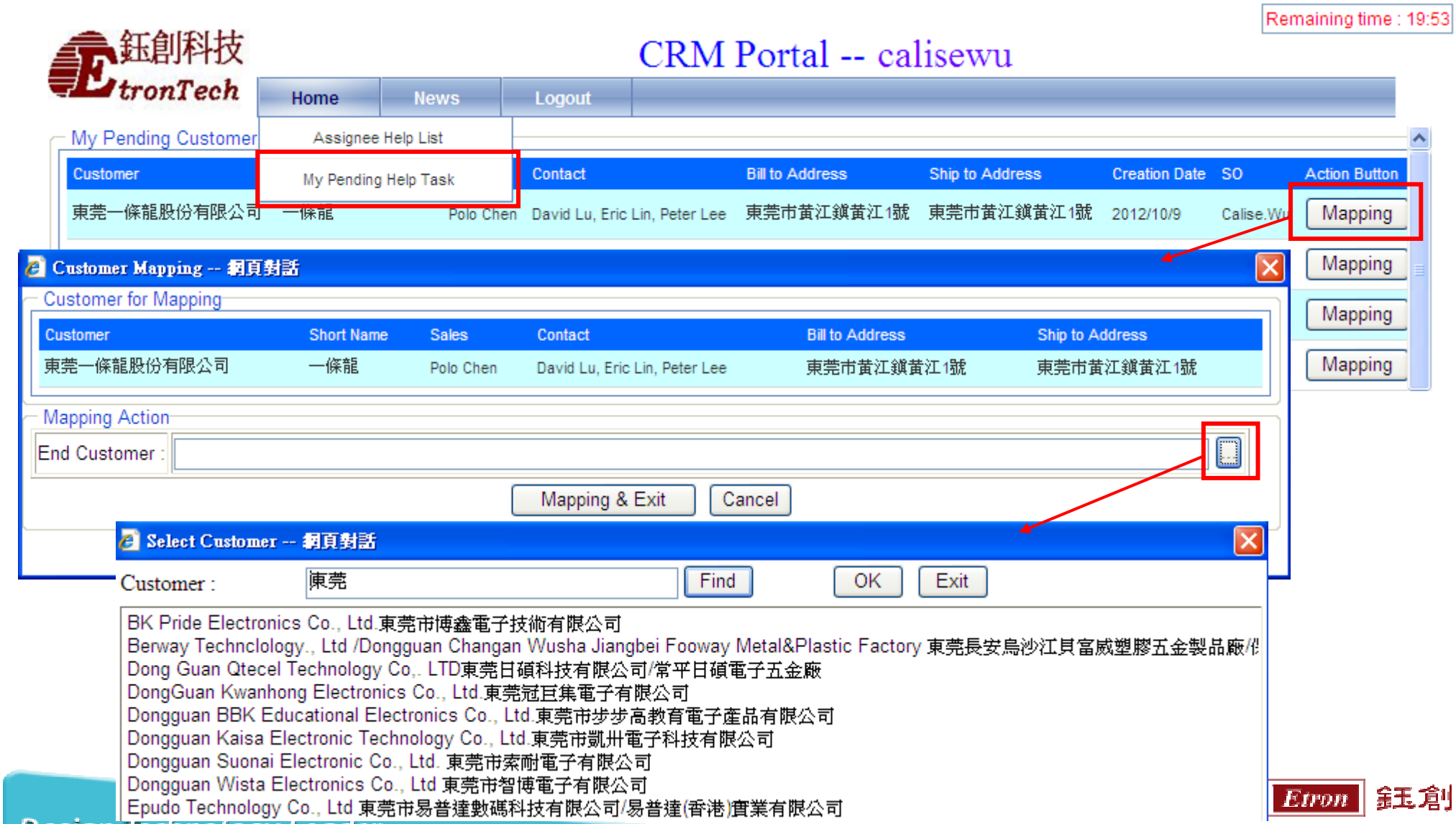

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President's Portal

President's Portal

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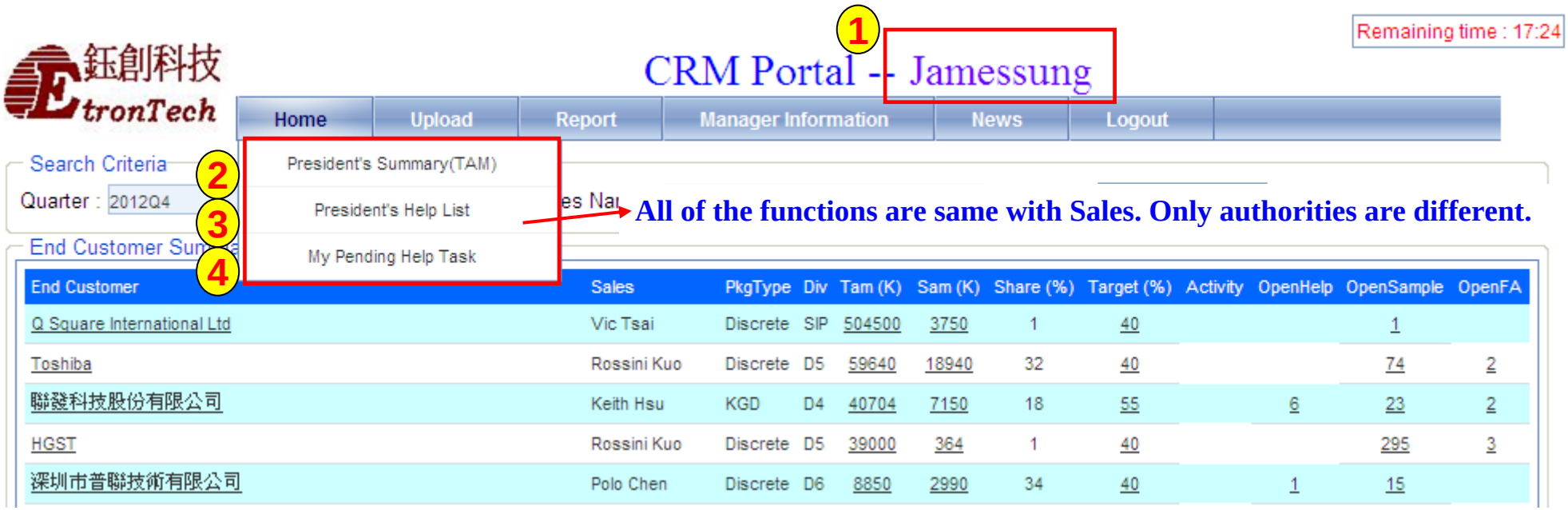

1. President's Name
2. Summary Report : Default page, include TAM/SAM…data
   President can read all of the summary report
3. President can read all of the helps (Include Open / Closed Help)
4. Helps on the President's stage

President's Portal – Excel Target Upload

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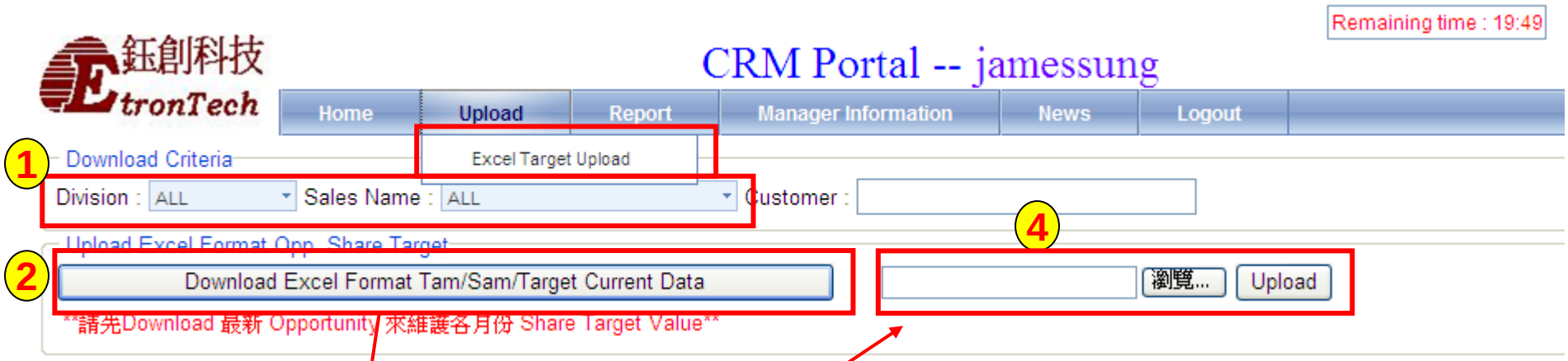

1 2 Enter Download Criteria → Download Template

3 Fill in TAM Target data of the field in yellow

4 Find Excel file → Upload → update CRM TAM

3

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1							201210				201211				201212			
2	End User	Div	Sales	Opportunity	Application	Pkg Type	TAM	SAM	Share%	**Target**	TAM	SAM	Share%	**Target**	TAM	SAM	Share%	**Target**
3	DONGGUAN YOUXUN EI	D1	Alvin Shih	16M*16 SDR	ADSL Router	Discrete	0	0	#DIV/0!	0	0	0	#DIV/0!	0	0	0	#DIV/0!	0
4	DONGGUAN YOUXUN EI	D1	Alvin Shih	16M*16 SDR	Router	Discrete	120	50	41.67%	40	120	50	41.67%	40	120	50	41.67%	40
5	DONGGUAN YOUXUN EI	D1	Alvin Shih	1M*16 SDR	ADSL Router	Discrete	0	0	#DIV/0!	0	0	0	#DIV/0!	0	0	0	#DIV/0!	0
6	DONGGUAN YOUXUN EI	D1	Alvin Shih	32M*16 DDR	IAD	Discrete	0	0	#DIV/0!	0	0	0	#DIV/0!	0	0	0	#DIV/0!	0
7	TPV Electronics(Fujian) Co	D1	Alvin Shih	1M*16 SDR	Monitor	Discrete	10	10	100.00%	42	10	10	100.00%	44	10	10	100.00%	46
8	上巨電子股份有限公司	D1	Alvin Shih	4M*32 SDR	WiFi Phone	Discrete	0	0	#DIV/0!	0	2	2	100.00%	40	0	0	#DIV/0!	0
9	中磊電子股份有限公司	D1	Alvin Shih	16M*16 DDR	ADSL Router	Discrete	51	30	58.82%	22	90	30	33.33%	11	80	40	50.00%	50

President's Portal– Query Customer Report

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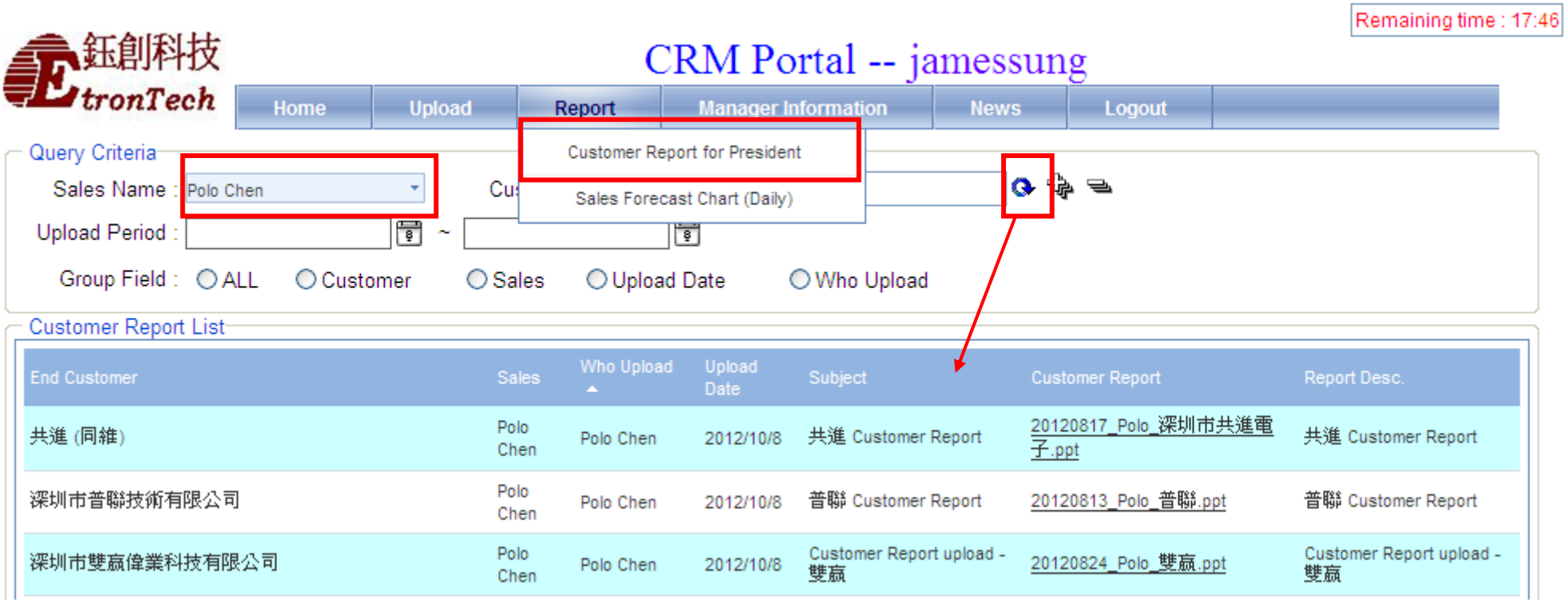
Remaining time : 17:46
CRM Portal -- jamessung
Home
Upload
Report
Manager Information
News
Logout
Customer Report for President
Sales Forecast Chart (Daily)
Query Criteria
Sales Name : Polo Chen
Upload Period :
Group Field : ALL Customer Sales Upload Date Who Upload
Customer Report List
End Customer | Sales | Who Upload | Upload Date | Subject | Customer Report | Report Desc.
共進 (同維) | Polo Chen | Polo Chen | 2012/10/8 | 共進 Customer Report | 20120817_Polo_深圳市共進電子.ppt | 共進 Customer Report
深圳市普聯技術有限公司 | Polo Chen | Polo Chen | 2012/10/8 | 普聯 Customer Report | 20120813_Polo_普聯.ppt | 普聯 Customer Report
深圳市雙贏偉業科技有限公司 | Polo Chen | Polo Chen | 2012/10/8 | Customer Report upload - 雙贏 | 20120824_Polo_雙贏.ppt | Customer Report upload - 雙贏